



User Guide | PUBLIC

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Working with SAP Business One Service Mobile App for iOS

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1 Introduction

With the SAP Business One Service mobile app, maintenance technicians who provide on-site services for customers can view and resolve the assigned service tickets easily and efficiently.

SAP Business One Service enables you to do the following over Wi-Fi or cellular networks:

- View and filter your service tickets and synchronize them to your calendar
- Resolve your service tickets
 - Edit, close, share and print service tickets
 - Scan bar codes or QR codes to identify items as needed and update their information
 - Use Favorite Options to check in and out, call customers, take photos, and view service history of items
 - Take Quick Actions to deal with sales orders, add resolutions, view service contracts for items, manage attachments, view common solutions, view information of other tickets, view customer information, and create follow-up tickets
- View your Key Performance Indicators (KPIs)

In addition, SAP Business One Service allows you to work offline. If you have no Internet access while working, you can download the latest service ticket data in advance, resolve the downloaded service tickets offline and upload the edited service tickets when you are online again.

i Note

When you are offline, you will not be able to perform any actions that require Internet connection.

You will be charged by your carrier if you make phone calls, or send or receive data over a cellular network with your mobile device. For information about your service plan and fees, contact your carrier.

SAP Business One Service is supported by both SAP Business One and SAP Business One, version for SAP HANA. However, if it is enabled by SAP Business One, the following features are unavailable:

- KPI screen
- The *Dashboard* tab on the *Business Partner* page
- BP dashboard
- The *Recommendations* tab on the *Items* page
- Generating PDF

For information about the fields used in SAP Business One Service, see the [online help](#) for SAP Business One and SAP Business One, version for SAP HANA.

If you are an IT administrator, see [Configuring SAP Business One Solutions for SAP Business One Service Mobile App \[page 40\]](#) for information about how to enable SAP Business One Service and making it work for your business.

Related Information

[Getting Started \[page 5\]](#)

[Resolving a Service Ticket \[page 13\]](#)

[Working Offline \[page 34\]](#)

[Clearing Customer Personal Data \[page 39\]](#)

2 Getting Started

This chapter shows you how to install, set up and log in to SAP Business One Service, what you can view and do on the home page, how to view your KPI data and how to configure your personal settings.

2.1 Installing SAP Business One Service Mobile App

This topic shows you how to download and install SAP Business One Service.

Procedure

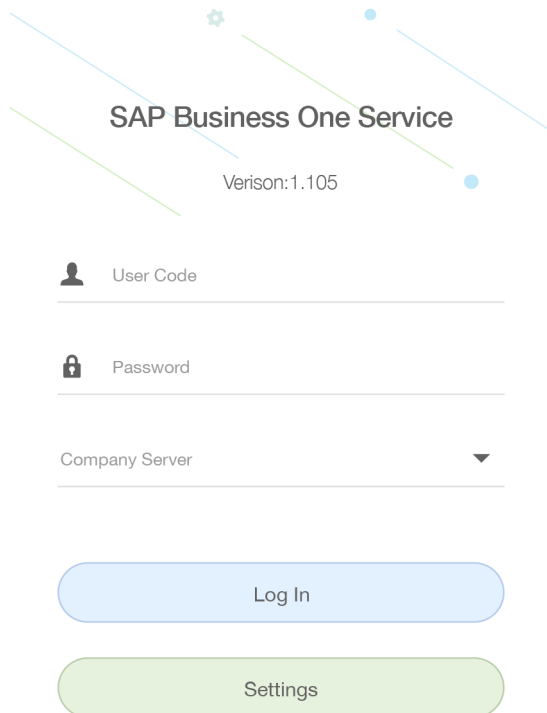
1. In Apple App Store, search for "SAP Business One Service".
2. Download and install the SAP Business One Service mobile app.

2.2 Logging In

This topic shows you how to set up and log in to SAP Business One Service.

Procedure

1. Open the SAP Business One Service mobile app.



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2. When logging in for the very first time, the [Settings](#) page pops up. You need to add your server address and port number, and then choose [Save](#).

If you do not know the server address, ask your IT administrator to look it up in the System Landscape Directory Control Center. If SAP Business One Service is used with SAP Business One Cloud, you can also use the external server address which is mapped in the Cloud Control Center.

Alternatively, you can switch on the [Demo System](#) button to work with a trial version.

3. Enter your user code or domain user code and your password, tap anywhere outside the text entry fields to hide the keyboard, select the database you would like to work with, and then choose [Log in](#).

If the login takes longer than 30 seconds, the action will time out.

Results

The home page of SAP Business One Service appears.

You can use Touch ID to log in next time. To enable Touch ID, see [Configuring Settings \[page 11\]](#).

You can also use your user code and password to log in when you are offline. For security reasons, the maximum number of offline login attempts is five. If you exceed the maximum number, your account will be locked and the Touch ID will be turned off. You then need to log in to the app online and switch on Touch ID again.

2.3 Home Page

On the home page, you can get an overview of your service tickets, call your customers, view customer locations on a map, filter your service tickets, check your service tickets in a monthly calendar, synchronize your service tickets to your calendar, view your KPIs, and configure your personal settings.

The screenshot shows the SAP Business One Service mobile app interface. At the top, there is a header bar with a gear icon for settings, the text 'SAP Business One Service', a refresh icon, and a calendar icon showing '31'. Below the header, there are two tabs: 'Tickets' (selected) and 'KPI'. Under the 'Tickets' tab, there is a filter section with 'Status: All' and 'Priority: All', and a dropdown arrow. Below this, there are two sections for service tickets, each with a location pin icon. The first section is for 'Today (03)' and contains three tickets: 10:30 AM (High priority, Open status) with subject 'The LCD monitor is dark...', 11:30 AM (High priority, Open status) with subject 'The computer can't be started...', and 1:30 PM (Medium priority, Open status) with subject 'The USB disk can't be read...'. The second section is for 'Feb 23, 2018 (04)' and contains two tickets: 09:40 AM (Low priority, Open status) with subject 'No USB device can be connected...' and 11:30 AM (High priority, Open status) with subject '2018FEB5365'. Each ticket entry includes a time, a red dot, a ticket ID, priority and status labels, a subject line, and a customer address.

Get an Overview of Your Service Tickets


By default, the *Tickets* tab displays the number and abstracts of your **open** service tickets for today and the next four days by chronological order in list views.

The following information of each service ticket is provided in each list: start time, service call number, priority (*High* in red, *Medium* in yellow or *Low* in blue), status (*Open* or *Closed*), subject and customer address.

You can pull down to refresh the lists.

Filter Your Service Tickets

By default, the home page displays all your open service tickets with all priorities for today and the next four days.


To filter your service tickets by status and/or priority, choose , select your desired status (*All*, *Open* or *Closed*) and priority (*All*, *High*, *Medium* or *Low*), and choose *Confirm*.

i Note


Your selections will be remembered and applied the next time you enter the [Tickets](#) tab.

You must choose [Confirm](#) to apply the changes made to the filtering conditions.

Call your Customers

If a valid phone number of your customer is provided, you can choose  to call your customer.

View Customer Locations on a Map

You can choose  to the right side of a date to go to the [Location](#) page to view customer locations on a map.




In the upper left corner of the [Location](#) page is a list of numbered circles, each representing a service ticket as sorted for that date on the [Tickets](#) tab.

A blue circle indicates that a valid address is provided, while grey indicates the opposite.

- If you choose a blue circle, you will be directed to the corresponding address and an abstract of the service ticket will be displayed.
- If you choose a grey circle, only an abstract of the service ticket will be displayed.

Check Service Tickets in a Monthly Calendar

You can check if you have any service tickets on a specific day in a monthly calendar view.


To do so, choose  to go to the calendar page, and then choose  and  to switch to your target month. In the month view, a date with a dot beneath indicates that you have at least one open service ticket that starts from, or extends over, or ends on the day.


Once you choose such a date, the home page appears, displaying a list of service tickets for the date. If you choose today, the home page displays lists of service tickets for today and the next four days (if any).

i Note

The service tickets displayed on the home page may vary depending on your filtering conditions.



Synchronize Service Tickets to Your Device Calendar App

You can choose  to synchronize your service tickets from SAP Business One Service to the [Calendar](#) app that comes with your device.

This option enables you to synchronize your service tickets for the last 11 days (including today) and those on future dates that you have viewed by choosing .

The data that are available for synchronization are: Subject, Service Call No., Address, Start Date, Start Time, End Date, End time, Priority, Status and Phone No.


i Note

If you have set up any third-party calendars in your device Calendar app, you need to go to [Settings](#)  [Accounts & Passwords](#) , choose the related e-mail accounts and switch off their associated [Calendars](#) before you can synchronize the service tickets successfully.

View Predefined KPIs

You can choose the *KPI* tab to view your performance data on a dashboard.

Configure Your Settings

You can choose  to get online help and configure your personal settings.

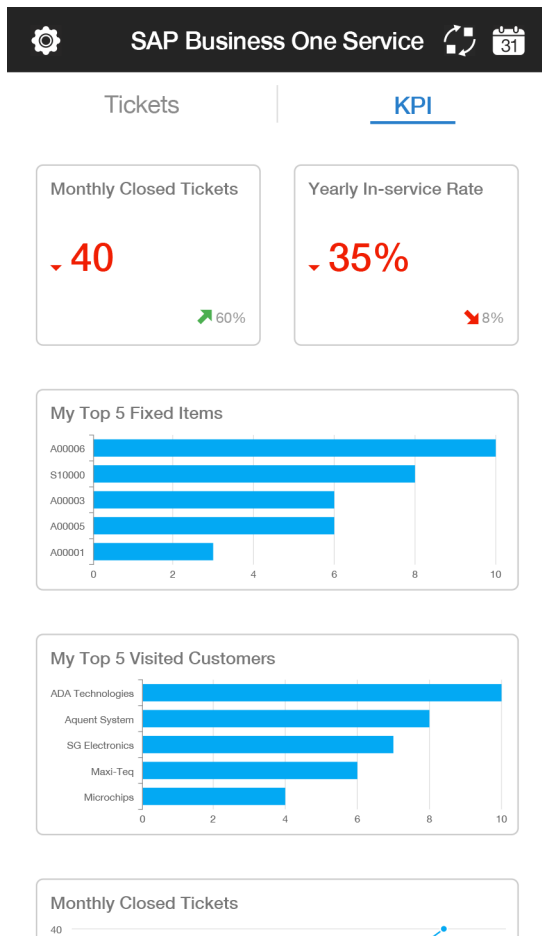
Related Information

[KPI Screen \[page 9\]](#)

[Configuring Settings \[page 11\]](#)

2.4 KPI Screen

The *KPI* (Key Performance Indicator) screen displays your performance data on a dashboard.




The predefined KPIs include the following:

| | |
|-----------------------------------|---|
| Monthly Closed Tickets | <p>The number of service tickets that you have closed this month.</p> <p>You can tap the tile to view more data by month, quarter or year in a line chart.</p> <p>The data is sourced from the end time of your closed service tickets. If the end time of a service ticket is null, the service ticket will not be included.</p> |
| Yearly In-Service Rate | <p>The percentage of your service tickets with valid service contracts over the last 12 months.</p> |
| My Top 5 Fixed Items | <p>The top five items that you have fixed.</p> <p>You can tap the tile to view the chart in full screen.</p> <p>The data is sourced from your closed service tickets.</p> |
| My Top 5 Visited Customers | <p>The top five customers that you have visited.</p> <p>You can tap the tile to view the chart in full screen.</p> <p>The data is sourced from your closed service tickets.</p> |

Customizing the KPI dashboard

If you are an IT administrator (professional user) and you want to customize the KPI dashboard, perform the following steps:

1. In the SAP Business One client, version for SAP HANA, from the toolbar, choose .
Alternatively, in the SAP Business One client, version for SAP HANA, from the menu bar, choose **Tools** > **Pervasive Analytics** >.


i Note

Only users with authorizations for the pervasive analytics designer can access the window.

2. Find the predefined advanced dashboard **Adv. Dashboard for SAP Business One Service App**.
You can add new widgets, arrange the order of the widgets, or modify the widgets. But you cannot delete this predefined advanced dashboard. By default, the system displays the predefined dashboard. You can customize it and define your own settings according to your business needs.
To create a new dashboard, proceed as follows:
 1. Choose an existing dashboard that you have selected.
 2. Make your settings according to your business needs.
 3. Choose **Save as** to save the new dashboard.To use the new dashboard, proceed as follows:
 1. Go to the mobile service web page at `https://<Server Address of Mobile Service>:<Port Number>/mobileservice/`.
 2. Log in to the system with your account.
 3. Under the **Services App** tab, choose a predefined dashboard in the drill-down list of **KPI Template**.For more information, see *How to Work with Pervasive Analytics*.

3. Ask the SAP Business One Service mobile app users to log out and then log in. They will find the customized dashboard on the *KPI* tab.

2.5 Configuring Settings

On the home page, tap  to configure your personal settings.

<Company Name> + Displays your company name and user code.
<User Code>

Offline Settings Enables you to download service ticket data and manage service tickets edited offline.
For more information, see [Working Offline \[page 34\]](#).

UDF Configuration Enables you to display and hide user-defined fields (UDFs).

By default, all UDFs are displayed. You can choose the UDFs that you want to hide on the [▶ Tickets ▶ Ticket Details ▶ UDF Configuration ▶ Ticket Details ▶](#) drill down page, and those that you want to hide on the [▶ Tickets ▶ Ticket Details ▶ ... ▶ Sales Order ▶ Sales Order ▶ UDF Configuration ▶ Sales Order ▶](#) drill down page.

i Note

- You can't hide any mandatory UDFs.
- The changes made to the UDFs only apply to the current user on the current mobile device. If you log in with another account or to another device, you need to configure them again.

The UDFs available for configuration are preset by IT administrators under the following categories in the SAP Business One client:

- *Service Call*: defines the upper list of UDFs on the [▶ UDF Configuration ▶ Ticket Details ▶](#) page.
- *Scheduling*: defines the lower list of UDFs on the [▶ UDF Configuration ▶ Ticket Details ▶](#) page.
- *Sales Order*: defines the UDFs on the [▶ UDF Configuration ▶ Sales Order ▶](#) page.

All types of UDFs are supported except for the *General*.

For more information about how to create user-defined fields, see the [online help](#) for SAP Business One, version for SAP HANA.

Touch ID/Face ID Enables you to use Touch ID or Face ID to log in.

The availability of the login methods depends on your mobile device.

Online Help Opens the online help for the SAP Business One Service mobile app.

Log Out

Enables you to log out of the mobile app.

3 Resolving a Service Ticket

This chapter will walk you through how to resolve a service ticket online.

Context

On the *Tickets* tab, open a service ticket to enter the *Ticket Details* page.

You can do the following from the *Ticket Details* page:

- View, edit, close, share, and print the service ticket
- Use favorite options to check in and out, call the customer, take photos, and view service history of the item in the service ticket
- Take quick actions to manage sales orders that are linked to the service call to which the service ticket belongs, add resolutions for the service ticket, view the service contract for the item in the service ticket, and view attachments of and add photos to the service call

3.1 Viewing and Editing Service Ticket Details

Take a look at what you can view and do on the scrollable *Ticket Details* page.

Ticket Details - Open Next

Service contract is valid. End Date: Feb 18, 2020

☆ Subject The brightness control button doesn't work.

Customer John Miller

Contact Person Roger Roberts

Service Call 2018FEB5361 High

Date / Time Start - Feb 21, 2018, 10:30
End - Feb 22, 2018, 10:30

Check In Phone Call Take Photo Service History

Address
Theobalds Rd, London, UK

Item No. 23765566

Item description
Motherboard MicroATX

Serial Number 46311475562

Mfr Serial No. 4353454

Information banner

The information banner on top of the page shows the validity of the service contract for the item in a service ticket.

If the service contract is valid, you can choose ⓘ to see more details.

Subject

The subject of a service ticket.

Customer

The name or customer code of the customer.

Contact Person


The name of the contact person of your customer.

Service Call

The service call number to which a service ticket belongs, followed by the priority of the service ticket (*High* in red, *Medium* in yellow or *Low* in blue).

Date/Time

Start and end time of the service ticket.

You can choose  to edit the start and end time for an open service ticket.

Favorite Options

The favorite options include *Check In (Out)*, *Phone Call*, *Take Photo*, and *Service History*.

For more information, see [Favorite Options \[page 18\]](#).

Address

The address of your customer.


If a valid address is provided, you can choose the address line to view it on a map.

Supplementary Code

It is only available in China and is not available until the next release.

Item Code

A code for the item in a service ticket, which is provided by your IT administrator.


If it is incorrect or not provided, you can choose  to scan for it or enter it manually when you are online. For more information, see [Identifying an Item \[page 17\]](#).







Item Description

A short description about the item in a service ticket, which is associated with its Item Code.

Serial Number


The Serial Number can be used to identify an item and is enabled and provided by your IT administrator.

If it is incorrect or not provided, you can choose  to scan for it or enter it manually to identify an item when you are online. For more information, see [Identifying an Item \[page 17\]](#).

To enable identifying an item by its Serial Number, the IT administrator needs to select *Serial Number* for the *Unique Serial Numbers by* field in the SAP Business One client, version for SAP HANA ( [Administration](#)  [System Initialization](#)  [General Settings](#)  [Inventory](#)  [Items](#) ).

Mfr Serial No.

The Manufacturer Serial Number can be used to identify an item and is enabled and provided by your IT administrator.

If it is incorrect or not provided, you can choose  to scan for it or enter it manually to identify an item when you are online. For more information, see [Identifying an Item \[page 17\]](#).

To enable identifying an item by its Manufacturer Serial Number, the IT administrator needs to select *Mfr Serial No.* for the *Unique Serial Numbers by* field in the SAP Business One client, version for SAP HANA

(|| Administration > System Initialization > General Settings > Inventory > Items >).

Actual Duration

The span of your actual working time for a service ticket.

If it is enabled by your IT administrator, you can choose  to edit it.

i Note

To enable or disable *Actual Duration*, the IT administrator needs to proceed as follows:

1. Go to `https://<Server Address of Mobile Service>:<Port Number>/mobileservice/`.
2. Log in with your credentials.
3. Under the *Service App* tab, select or deselect *Enable Actual Duration*.

Remarks

You can choose  to add a remark for a service ticket.

You can dictate text and enter text through the keyboard.

<User Defined Fields>

For more information, see *UDF Configuration* in [Configuring Settings \[page 11\]](#).

More Information

Further information about a service ticket, including the following fields: *Origin*, *Problem Type*, *Problem Subtype*, *Call Type*, *Handled By* or *Queue*, and *Remarks*.

Quick Actions

At the bottom of the screen, you can choose  to take quick actions for your service ticket.

Related Information

[Quick Actions \[page 20\]](#)



3.2 Identifying an Item

This topic details the steps for identifying an item by its Serial Number or Manufacturer Serial Number, or its Item Code.

Context

If you need to identify an item by yourself, proceed as follows.

Procedure


1. Find the Serial Number or the Manufacturer Serial Number for the item.
 - Go to the *Serial Number* field of the *Ticket Details* page, choose  to scan the bar code or QR code on the item for the Serial Number, or enter it manually.
 - Go to the *Mfr Serial No.* field of the *Ticket Details* page, choose  to scan the bar code or QR code on the item for the Manufacturer Serial Number, or enter it manually. Optionally, you can turn on a flashlight when scanning.
 - a. Confirm the Serial Number or Manufacturer Serial Number and choose *Done*.

i Note

You will need to select the right item if more than one item is found.

- b. Choose *Yes* when you are asked, (<Item Code: item description>) Item will be updated. Continue?

The *Serial Number* or *Mfr Serial Number*, *Item Code*, and *Item Description* will be updated, as will the *Service Contract* and *Service History* (if applicable).

2. If the Serial Number or Mfr Serial Number can't be found, please find the Item Code for the item.
 - a. On the *Item Code* field of the *Ticket Details* page, choose  to scan the bar code or QR code on the item for the Item Code, or enter it manually. Optionally, you can turn on a flashlight when scanning.
 - b. Choose *Done*.

i Note

You will need to select the right item if more than one item is found.

- c. Choose *Yes* when you are asked, (<Item Code: item description>) Item will be updated. Continue?

The *Item Code* and *Item Description* will be updated. The *Service Contract* and *Service History* won't be updated.

The old *Serial Number* or *Mfr Serial Number*, *Service Contract* and *Service History*, if provided, will be cleared.

3.3 Favorite Options

You can use favorite options to check in and out, call the customer, take photos, and view service history of the item in your service ticket.

On the upper part of the *Ticket Details* page, you have the following favorite options:

Check In (Out)

Enables you to check in and out in an open service ticket.

Phone Call

Enables you to call your customer.

Note that this option is unavailable if no valid phone number is provided.

Take Photo

Enables you to take photos for an open service ticket.

Service History

Enables you to view a list of all other service call records that contain the item in the current service ticket.

You can open a service call record for more information, including the subject, service call number, date of creation, remarks, resolution, and all of the service tickets contained in the service call and their details.

To enable *Service History*, IT administrators need to select either *Mfr Serial No.* or *Serial Number* for the *Unique Serial Numbers by* field in the SAP Business One client, version for SAP HANA (▮ *Administration* ▸ *System Initialization* ▸ *General Settings* ▸ *Inventory* ▸ *Items* ▮).

i Note

- The favorite options can't be customized for this release.
- The *Service History* option is unavailable if no Serial Number or Manufacturer Serial Number is provided.

Related Information

[Checking In and Out \[page 19\]](#)

[Taking Photos \[page 20\]](#)

3.3.1 Checking In and Out

This topic details the steps for checking in and out for an open service ticket.

Context


Checking in or out is optional. You can check in and out only once for an open service ticket. When an open service ticket is closed, you are not allowed to do so unless it is reopened by your IT administrator.

Procedure

1. On the upper part of the *Ticket Details* page, choose *Check In*.
2. Choose *Yes* when you are asked, *Do you confirm this check in?*


Once you checked in, the *Check In* icon will be replaced with *Check Out*.

Your check-in status will be displayed in the *Address* field.

If you choose the address line, you can view your check-in time and address over the  icon on a map, as well as the customer address (if provided).

3. Choose *Check Out*.
4. Choose *Yes* when you are asked, *Do you confirm this check out?*

Your check-out status will be displayed in the *Address* field.

If you choose the address line, you can view your check-in and check-out time and address over the  icon in the map, as well as the customer address (if provided).

5. When you are asked, *Do you want to close this ticket?*, you can choose *Yes* to go on closing your ticket, or *No* to stay on the *Ticket Details* page.

Related Information

[Closing, Sharing and Printing a Service Ticket \[page 30\]](#)

3.3.2 Taking Photos

This topic shows you how to take photos for a service ticket.

Procedure

1. On the upper part of the *Ticket Details* page, choose *Take Photo*.
2. Choose the round button at the bottom of the screen to take a photo.
3. If you're satisfied with the photo, choose *Use Photo*; otherwise, choose *Retake* to take a new one.
4. Enter a name for the photo.
5. Choose *Done*.

Results

Tap  and choose *Attachment*, you will find your photo on the *Attachment* page.

Related Information


[Quick Actions \[page 20\]](#)

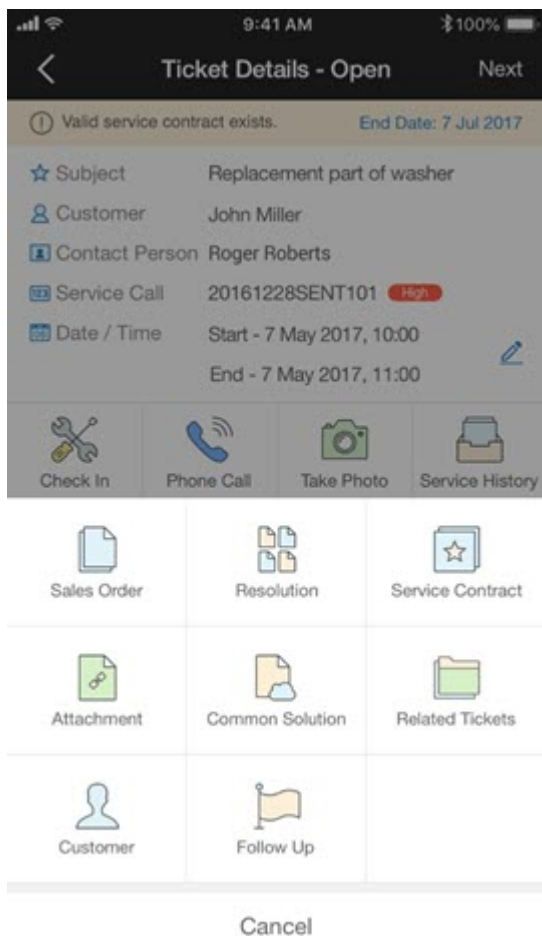
[Viewing and Adding an Attachment \[page 29\]](#)

3.4 Quick Actions

You can take Quick Actions to:

- Manage sales orders that are linked to a service call
- Add a resolution for a service ticket
- View the service contract for an item
- View attachments of and add photos to a service call
- View the solutions of the service ticket
- View other tickets that belong to the current service call
- View customer information of the ticket and contact them
- Create a follow-up ticket for the existing one

At the bottom of the *Ticket Details* screen, choose  to take the following quick actions:



Note

For a closed ticket or a ticket with dirty data, the *Follow Up* option is disabled and in gray.

Manage Sales Orders

The *Sales Order* option enables you to view, edit, create, duplicate, and cancel sales orders that are linked to a service call to which your current service ticket belongs.

Add Resolution

The *Resolution* option enables you to add your resolution for a service ticket.

You can dictate text and enter text through the keyboard.

View Service Contract

The *Service Contract* option enables you to do the following:

- View details of the service contract for the item in a service ticket
- Perform a fuzzy search on the *Contract Type* drill down page from the service contract detail page if the *Contract Type* is set to *Serial Number* by your IT administrator

Example

You can search **Serial** for the serial number or manufacturer serial number.

i Note

The [Service Contract](#) option is unavailable if no serial number is provided for an item.

Manage Attachments

The [Attachment](#) option enables you to view and download all attachments of the service call to which your current service ticket belongs, and add photos to the service call.

View Common Solution

The [Common Solution](#) option enables you to view the solutions of the service ticket. Do the following to view solution details:

1. After choosing [Common Solution](#), in the list of the solutions, choose a solution to see its detail.
2. To see the attachments of the solution, choose [Attachment](#).
3. To download an attachment, on the [Attachment](#) page, choose the file. You can open the file if you have installed the support application in mobile device.

View Related Tickets

The [Related Tickets](#) option enables you to view other tickets that belong to the current service call.

To see the details of another ticket, in the list view of [Related Tickets](#), choose the ticket that you want to view. If the ticket belongs to you (the current user), in the ticket page, choose [Details](#) on the upper right corner, you can edit the ticket by using the edit button.

i Note

If you have viewed solution information and related tickets offline, and later see it has been cleared when you work online, that is because SAP Business One Service is designed to automatically clear all data stored on your mobile device. For more information, see [Clearing Customer Personal Data \[page 39\]](#).

View Customer Information

The [Customer](#) option enables you to view customer information of the ticket and contact them.

When you choose the customer quick action button or the customer line at detail page, customer information is displayed. To contact the customer, you can do the following:

- Choose the telephone icon in the lines of [Mobile Phone](#) and [Telephone](#), app dials the phone number.
- Choose the SMS icon in the lines of [Mobile Phone](#) and [Telephone](#), app creates a message to the phone number.
- Choose the > icon in the lines of [Ship to](#) and [Bill to](#), app opens the map of the address.

i Note

Auto dial is only available if in SAP Business One system, the phone number is maintained for the customer. Otherwise the telephone icon and the SMS icon here are gray.

Create Follow-up Ticket

The *Follow Up* option enables you to create a follow-up ticket for the existing one. To create a follow-up ticket, do the following:

1. Choose the *Follow Up* quick action button.
2. In the message box, choose *Yes*.
3. Choose the ticket from the ticket list.
4. In the *Ticket Details* page, check the information. You can edit *Date/Time* if you are authorized in the configuration.

i Note

To enable or disable the Follow Up quick action, the IT administrator needs to proceed as follows:

1. Go to `https://<Server Address of Mobile Service>:<Port Number>/mobileservice/`.
2. Log in with your credentials.
3. Under the *Service App* tab, select or deselect *Enable Follow Up*.

If you save a follow-up ticket in offline mode, app treats it as a ticket with dirty data, as same as that for an offline edited ticket.

3.4.1 Managing Sales Orders

3.4.1.1 Viewing Sales Orders

The *Sales Order* page displays the sales orders in the service call to which your current service ticket belongs.

| Sales Order | | |
|--|-----|----------------------|
| Open | All | Approval Status |
| ● 357 - Earthsharker Corporation 2017/06/04 | | Open > \$2,600.00 |
| ● 356 - SG 2017/05/22 | | Open > \$220.00 |
| ● 355 - Microchips 2017/05/04 | | Open > \$600.00 |

Open

Displays a list of open sales orders that are linked to the service call. Each sales order has a document number, preceded by a blue dot.

You can pull down to refresh the list.

Open a sales order. The following tabs will be displayed:

- [Header](#)
Displays the details of the sales order, including the items, financial information, document number, customer information and attachments.
You can choose [Items](#) to go to the [Contents](#) tab to find all of the items in the sales order.
- [Contents](#)
Displays a list of all the items in the sales order. You can open an item to see more details.
- [Logistics](#)
Displays the shipping address, billing address and shipping type.
- [Accounting](#)
Displays payment terms, payment method and the name of the Business Partner project.

[All](#)

Displays a list of all the sales orders that are linked to the service call to which your current service ticket belongs.

[Approval Status](#)


On this tab, you can do the following:

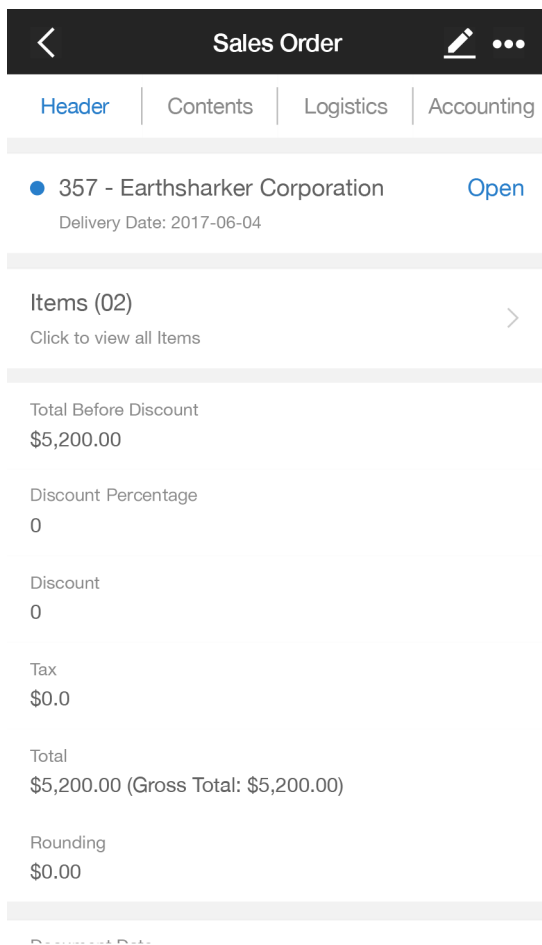
- Check the approval progress of edited sales orders which are pending approval by the manager
- Add approved sales orders to the relevant service calls


3.4.1.2 Editing an Existing Sales Order


This topic shows you how to edit an existing sales order for an open service ticket.

Procedure

1. In an open service ticket, tap  and choose [Sales Order](#).
2. Open the sales order that you want to edit from the [Open](#) or [All](#) tab.




3. Choose  in the upper right corner.
4. On the *Edit Sales Order* page, make changes to the editable fields above the *Items* field.
You can dictate text and enter text through the keyboard.
5. Choose *Items* to go to the *Items* page.
 - Modify or delete the existing items.
 - Choose *Choose Items* to select new items that you want to add, choose *Done*, then specify their quantities.

As of SAP Business One 9.3 PL10, you can use the barcode scanning function to quickly add an item. To do it, tap  in the top-right hand corner.

Make changes to the editable fields below these items, then choose *Done*.

6. On the *Edit Sales Order* page, make changes to the editable fields below the *Items* field and choose *Save*.
 - If this sales order does not need approval by your supervisor or manager, you can refresh to view it with a new revision number under the *Open* tab and *All* tab, and select it later when you close the related service ticket.
 - If this sales order needs approval by your supervisor or manager, note the following:

- If you have edited any fields in the sales order that need approval, a new approval process will be triggered. In this case, proceed as follows:
 1. In the window *Approval Required – <Template Name>*, enter your remark (optional) and tap *OK*.
 <Template Name> is the name of an approval template used by your IT administrator to define fields in your sales order that need approval. If your sales order triggers multiple approval templates, you need to enter your remarks for each template and tap *OK*.
 2. The sales order appears as a revision with a new document number under the *Open* tab, *All* tab and *Approval Status* tab. Pull down to refresh to trace and view the status of the document from any of these tabs.
 - If your sales order is approved, go to the *Approval Status* tab, choose the sales order and then choose  to add it to the relevant service call.
 - If your sales order is rejected, you can make modifications and try again.
- If you have edited the *Remarks* field and other fields (if any) in the sales order that don't need approval, you will see the window *Approval Required – <Template Name>* again; however, an actual approval process will not be triggered.
 Tap *OK* in the *Approval Required* window. Your changes in the document will be saved, but your remarks in the *Approval Required* window won't.
 The sales order will appear as a revision with a new document number under the *Open* tab and *All* tab.

i Note

- The *Approval Status* tab displays the approval progress of all sales orders that you have edited for all service tickets.
- The following information in a sales document cannot be modified:
 - Customer code
 - Customer name
 - Currency
- The following information in an **approved** sales document cannot be modified:
 - Branch
 - Discount%
 - Total
 - Payment terms



Related Information

[Closing, Sharing and Printing a Service Ticket \[page 30\]](#)

3.4.1.3 Creating a New Sales Order

This topic shows you how to create a new sales order for an open service ticket.

Procedure


1. In an open service ticket, tap  and choose *Sales Order*.
2. Choose  in the upper right corner.
3. On the *Create Sales Order* page, make necessary changes to the editable fields above the *Items* field.

You can dictate text and enter text through the keyboard.

| Cancel | Sales Order | Done |
|------------------|-------------|------|
| Series | | > |
| Business Partner | Required | > |
| Contact Person | | |
| Currency | Required | |
| Sales Employee | | |
| Posting Date | | > |
| Delivery Date | | > |
| Document Date | | > |
| Remarks | | > |
| Customer Ref. No | | > |

4. Choose *Items* to select the items that you want to add, specify their quantities, make necessary changes to the editable fields below these items, then choose *Done*.

You can optionally choose *Choose Items* to add more items.

As of SAP Business One 9.3 PL10, you can use the barcode scanning function to quickly add an item. To do it, tap  in the top-right hand corner.

5. On the [Create Sales Order](#) page, make necessary changes to the editable fields below the *Items* field and choose *Done*.
 - If the sales order doesn't need approval, a new sales order will be created accordingly. You can refresh to view it from the *Open* or *All* tab, and select it later when you close the relevant service ticket.
 - If the sales order needs approval, no new sales order will be created. This type of sales orders needs to be created in the SAP Business One client.

Related Information

[Closing, Sharing and Printing a Service Ticket \[page 30\]](#)

3.4.1.4 Duplicating a Sales Order

This topic shows you how to duplicate an open sales order in an open service ticket.

Procedure

1. In an open service ticket, choose an open sales order from the *Open* or *All* tab on the *Sales Order* page.
2. Choose **▶ ... > Duplicate > Create** **▶**.
3. On the *Open* or *All* tab, pull down to refresh.

3.4.1.5 Canceling a Sales Order

This topic shows you how to cancel an open sales order in an open service ticket.

Procedure

1. In an open service ticket, choose an open sales order from the *Open* or *All* tab on the *Sales Order* page.
2. Choose **▶ ... > Cancel Order > Confirm** **▶**.

i Note

Once confirmed, the cancellation is irreversible.

3. On the *Open* or *All* tab, pull down to refresh.

3.4.2 Viewing and Adding an Attachment










You can view an attachment and add photos for an open service ticket from the [Attachment](#) page.

Prerequisites

Before adding an attachment, please ensure that it is virus-free.



Context

The [Attachment](#) page lists all of the attachments that are linked to the service call to which your current service ticket belongs. You can view an attachment and add photos for an open service ticket from this page.

| < | Attachment | + |
|---|-------------------------------|------|
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |
|  | 20161228SENT101 2017/04/03 | 1.3M |

Procedure

To add a photo to an open service ticket, proceed as follows:

1. In the service ticket, tap , choose *Attachment* and tap .
2. Choose *Take Photos* to take a photo, or *Choose Photos* to select a photo from your photo albums.
3. Enter a name for the photo.

You can dictate text and enter text through the keyboard.

4. Choose *Done*.

i Note

You can't edit or delete an added photo.

Once you choose an attachment, it'll be cached. The cached attachment stays as is in your mobile app even if it is modified later by your IT administrator in the SAP Business One client, version for SAP HANA.

Related Information

[Taking Photos \[page 20\]](#)

3.5 Closing, Sharing and Printing a Service Ticket

This topic shows you how to close an open service ticket, and share and print it.

Prerequisites

If you want to share a service ticket by e-mail, make sure you have configured an account in your e-mail app.

Procedure

1. On the *Ticket Details* page of an open service ticket, choose *Next* in the upper right corner.
2. A list of all of the sales orders for the current service call appears. Select the appropriate one and choose *Next*.

i Note

This step will be skipped if there is no sales order for the current service call.

3. The *Ticket Summary* page appears. Ask your customer to review and confirm the service ticket details.


Note that when two or more currencies are involved, the *Grand Total* field is blank.

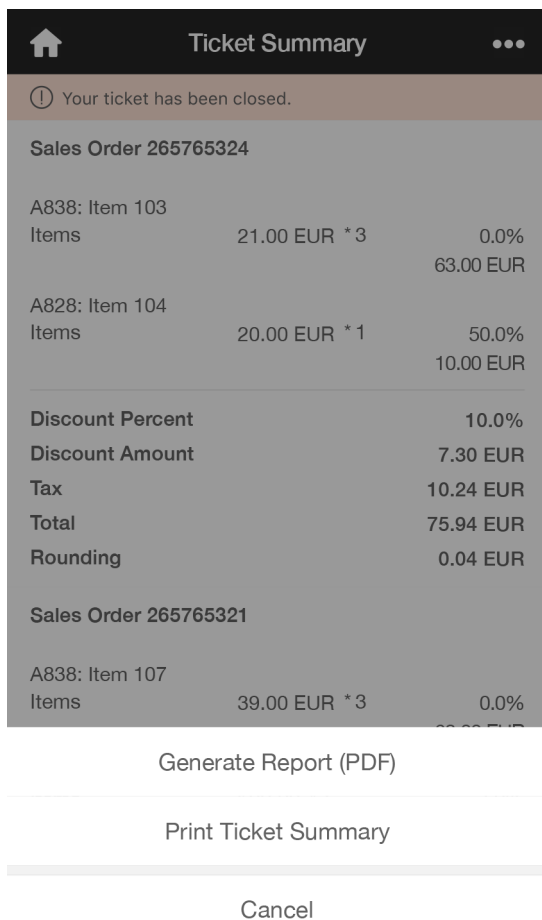
- If a customer signature is needed, ask your customer to choose *Signature*, sign on your phone screen and choose *Done* to confirm the signature.




- If a customer signature is not needed, choose *Done*.

To enable or disable customer signatures, an IT administrator needs to proceed as follows:

1. Go to `https://<Server Address of Mobile Service>:<Port Number>/mobileservice/`.
 2. Log in with your credentials.
 3. Under the *Service App* tab, select or deselect *Enable Signature*.
4. When you are asked, *This ticket will be closed. Continue?*, choose *Yes* and proceed as follows:
 - To print and share the service ticket immediately, go to the next step.
 - To return to the home page and print and share the service ticket later, choose . To print and share the service ticket from the home page, open the service ticket, choose *Report*, and go to the next step.
 5. Choose ... in the upper right corner of the *Ticket Summary* page.



- To generate and share a report for your service ticket, proceed as follows:
 1. Choose [Generate Report \(PDF\)](#) to generate a formal report in PDF format.
 2. Choose  and then choose to share the PDF report through E-mail, Airdrop, or other apps.

i Note

The sharing options may vary depending on your device, operating system, and applications.

System Report is used as the default report template. To change the default setting, an IT administrator needs to proceed as follows:

1. Go to the mobile service web page at `https://<Server Address of System Landscape Directory>:<Port Number>/ControlCenter/`.
2. On the *Service* tab, choose *Mobile Service*.
3. Log in to the system with your account.
4. Under the *Services App* tab, you have the following options:
 - *Choose Report Template*
With this field, you can upload a Crystal Report with a file in the format of rpt, which will then be used to generate a report of the PDF format.

i Note

It is recommended that you customize your own rpt file based on the system report file. Make sure to keep the `ServiceCallId` and `Line` parameters. Please also click the [Save](#) button after a file is chosen.

- [Reset to System Report](#)
With this field, the default report template will be restored and used.
- [Export System Report](#)
With this field, you can download the system report file and export it to your system.
- To print the service ticket summary, choose [Print Ticket Summary](#), select a portable Bluetooth thermal printer and choose [Print](#).

i Note

The portable Bluetooth thermal printer must meet the following minimum requirements:

- It supports Bluetooth 4.0 or higher.
- It supports the language and the character set that you use for printing.
- It is capable of printing bar codes, QR codes, and images in JPG or PNG formats.

4 Working Offline

This chapter shows you how to use SAP Business One Service to work offline.

If you have no Internet access while working, you can download the latest service ticket data to your mobile device in advance, resolve the downloaded service tickets offline and upload the edited service tickets when you are online again.

Note that when you are offline, you will not be able to perform any action that requires Internet connection.

4.1 Downloading Service Ticket Data

This topic details the steps for downloading service ticket data to your mobile device.

Prerequisites

- Your mobile device has enough storage space for the download.
- Your mobile device is online.

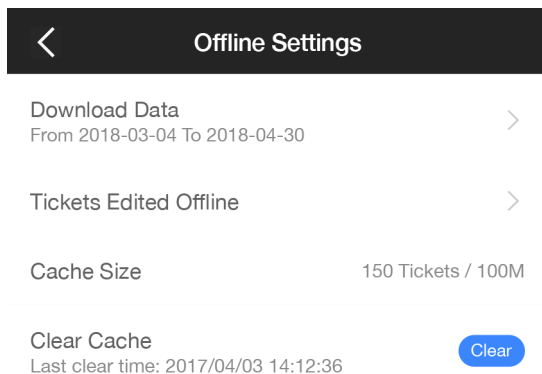
Context

Before you can view and resolve your service tickets in SAP Business One Service when you are offline, the service ticket data must be downloaded.

To download service ticket data, proceed as follows:

Procedure

1. From the home page, choose  [Offline Settings](#) > [Download Data](#) .



2. Choose a time period (1 day, 3 days, 1 week, 2 weeks, 1 month, or 3 months, starting from today) for which you want to download your service tickets, or specify a date range no greater than 100 days.
3. Choose [Download](#). The download begins.

If necessary, you can choose [Stop](#) to stop the download. In this case, the downloaded data is saved and valid, but incomplete.

i Note

If the download stops unexpectedly, please follow the system instructions to proceed.

Results

- The following data of a service ticket is downloaded: ticket details, check in/out data, service history, sales orders, service contract, and attachment names (The attachments themselves will be loaded when you open them online).
You can view and resolve the downloaded service tickets from the [Tickets](#) tab of the home page later when you are offline.
- You can manage the downloaded data from the [Offline Settings](#) page.
 - You can find the number of the downloaded service tickets and their cache size in the [Cache Size](#) field.
 - If you want to delete all downloaded data, choose [Clear Cache](#), choose [Yes](#) when you are asked, `Are you sure you want to clear the cache?` and then choose [OK](#).

4.2 Resolving Service Tickets Offline

This topic describes how to resolve downloaded service tickets when you are offline.

Context

The way to resolve downloaded service tickets when you are offline is the same as when you are online, except that you will not be able to perform any actions that require Internet connection. The icons of such actions are greyed out.

Here are some examples of what you are unable to do offline.

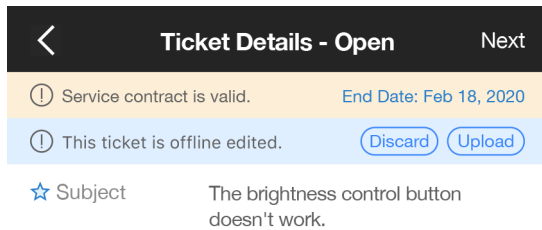
❖ Example


- You can't add a new item to a sales order, because the selection list of items can't be loaded without Internet connection.
- If a customer signs your service ticket, you can't view the service ticket report. You will get this message, `Customer signature is not available in offline mode; you cannot view the report.`

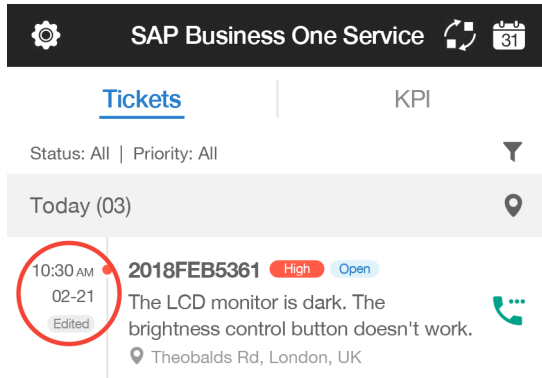
- If one of the sales orders for a closed service ticket is not cached or downloaded, you can't view the service ticket report. You will get this message, Sales Order <Sales Order Number> is not available in offline mode; you cannot view the report.

Results


- When your editing is done, you can *Discard* or *Upload* it from the *Ticket Details* page. To discard the changes made to the service ticket, choose *Discard*. Otherwise, you can upload it later when you are online.



- If you choose  on the *Ticket Details* page, you will be directed to the *Tickets Edited Offline* page, where the service tickets that you have edited offline are listed. To discard the changes made offline to one or multiple service tickets, select the desired service tickets and choose *Discard*. Otherwise, you can upload later when you are online.
- The service tickets are marked as *Edited* on the *Tickets* tab of the home page.



Note

- The service tickets displayed on the home page may vary according to your filtering conditions.
- If you tap  and choose *Offline Settings* > *Clear Cache* > *Yes*, all downloaded and cached service ticket data, including the changes you have made offline, will be deleted.
- The edited service ticket data stay **offline** (even if you are online later) until you discard them or upload them successfully.

Related Information

[Resolving a Service Ticket \[page 13\]](#)


4.3 Uploading Service Tickets Edited Offline

This topic shows you how to upload service tickets edited offline to the back-end server.

Prerequisites

- Your mobile device is online.
- You have service tickets edited offline in SAP Business One Service.

Procedure

1. Log in to SAP Business One Service.
 2. The following message appears: `You have tickets edited in offline mode. Do you want to view them now?`
 - To upload them immediately, choose *Yes* and proceed as follows:
 1. On the *Tickets Edited Offline* page, select the service tickets that you want to upload. Optionally, you can choose *Discard* to discard the changes made offline to your selected service tickets, including customer signatures (if any).
 2. Choose *Upload* and follow the system instructions to complete the upload.
 - To upload the service tickets later, choose *No* to go to the home page. From the home page, you can upload the service tickets edited offline in the following ways:
 - To upload the service tickets one by one, open a service ticket on the *Tickets* tab to enter the *Ticket Details* page, then choose *Upload* and follow the system instructions to proceed.
 - To upload multiple or all service tickets edited offline in one time, tap  and choose *Offline Settings* > *Tickets Edited Offline* >, select multiple or all service tickets, choose *Upload* and follow the system instructions to proceed.
- Optionally, you can choose *Discard* on the *Tickets Edited Offline* page to discard the changes made offline to your selected service tickets, including customer signatures (if any).
If necessary, you can choose *Stop* to stop the upload.

i Note

- The upload action applies to the service call level. If you choose to upload one service ticket of a service call, all of the other service tickets of the same service call will be selected and uploaded together.





- You must upload all of the service tickets edited offline, if any, before you can download any service ticket data to your mobile device.
- If the upload fails for unidentifiable reasons, for example, update failure due to network connectivity, please try again later or discard the changes made offline.

5 Clearing Customer Personal Data

Customer personal data can be cleared manually and is cleared automatically by SAP Business One Service in a specific scenario.

Procedure

To clear customer personal data manually, proceed as follows:

- To clear customer personal data contained in the changes that you have made offline for a service ticket, you need to discard all the changes in one of the following ways:
 - On the *Tickets* tab of the home page, open the service ticket to go to the *Ticket Details* page, and choose *Discard*.
 - Tap  and choose *Offline Settings > Tickets Edited Offline* , select the service ticket, and choose *Discard*.
You can also use this tab to discard the changes made offline to multiple service tickets, if they contain personal data of your customers.
- To clear customer personal data contained in the downloaded or cached data, you need to clear all data stored on your mobile device, including all the changes that you have made offline.
To do so, tap  and choose *Offline Settings > Clear Cache > Yes > OK* .

In addition, in order to help protect personal data for your customers, SAP Business One Service is designed to automatically clear all data stored on your mobile device, including the attachments, item images and all the changes you have made offline, in the following scenario:

You have downloaded or cached some data and then been offline. → Your system administrator changes any personal data for your customers from the SAP Business One client as requested by the customers. → You open the mobile app when you are back online.

In this scenario, you will receive one of the following messages:

- To protect data privacy for your customers, all cached data, including the changes you have made offline, have been deleted. Please log in again to proceed. For more details or help, please contact your system administrator.
- To protect data privacy for your customers, all cached data, including the changes you have made offline, have been deleted. For more details or help, please contact your system administrator.

You need to choose *OK*, and then log in again to retrieve the latest data.

6 Configuring SAP Business One Solutions for SAP Business One Service Mobile App

This section includes the steps necessary for IT administrators to configure SAP Business One solutions to enable SAP Business One Service.

To customize SAP Business One Service after the configuration, please see the previous topics in this guide.

To create a new sales order that needs approval by the manager for a mobile app user, please see [Setting Up Approval Procedure for Sales Orders \[page 81\]](#)

6.1 Hardware and Software Requirements

This topic describes the hardware and software requirements for mobile devices and the requirements for SAP Business One solutions.

Requirements for Mobile Devices

SAP Business One Service requires:

- iPhone 5 and above
- iOS 8.0 and above

Requirements for SAP Business One

1. You have installed SAP Business One 10.0 FP2105 or higher, or SAP Business One, version for SAP HANA, 9.3 PL04 or higher..
2. In the server components installation or upgrade, you have selected the *Mobile Service* component. If the mobile app is used externally, you need to configure access from the mobile device to the Mobile Service, System Landscape Directory and Analytics Platform (available in the version for SAP HANA). For reference, see the sections *Prepare Certificates* and *Configure Nginx Reverse Proxy* in the guide [How to Deploy SAP Business One with Browser Access](#).

i Note

You need to deploy the [Service Layer](#), [Analytical Features](#) (available in the version for SAP HANA) and [App Framework](#) components in order for this mobile app to work successfully.

For further information about **installing and upgrading** SAP Business One and SAP Business One, version for SAP HANA, see the *Administrator's Guide* that is provided on the SAP Business One product DVD or in the download package.

Requirements for SAP Business One Cloud

- You have installed SAP Business One Cloud 1.1 patch level (PL) 09 or higher.
- You have installed SAP Business One 9.3 patch level (PL) 04, version for SAP HANA or higher.
- In the server components installation or upgrade, you have selected the *Mobile Service* component. After successfully installing the *Mobile Service*, in the Cloud Control Center, you can view the services from [► Landscape Management ► Mobile Services ▾](#).
- If the mobile app is used externally, you need to register the mappings between the external addresses and the internal addresses of the Mobile Service, System Landscape Directory and Analytics Platform in the Cloud Control Center. For more information about the *Cloud Control Center* and *mapping internal and external URLs*, see the [Administrator's Guide for SAP Business One Cloud](#).

i Note

In the on-demand environment, domain users that are set up as Cloud Operators in the Cloud Control Center will be able to see all companies (including those to which the users don't belong) when logging into the following:

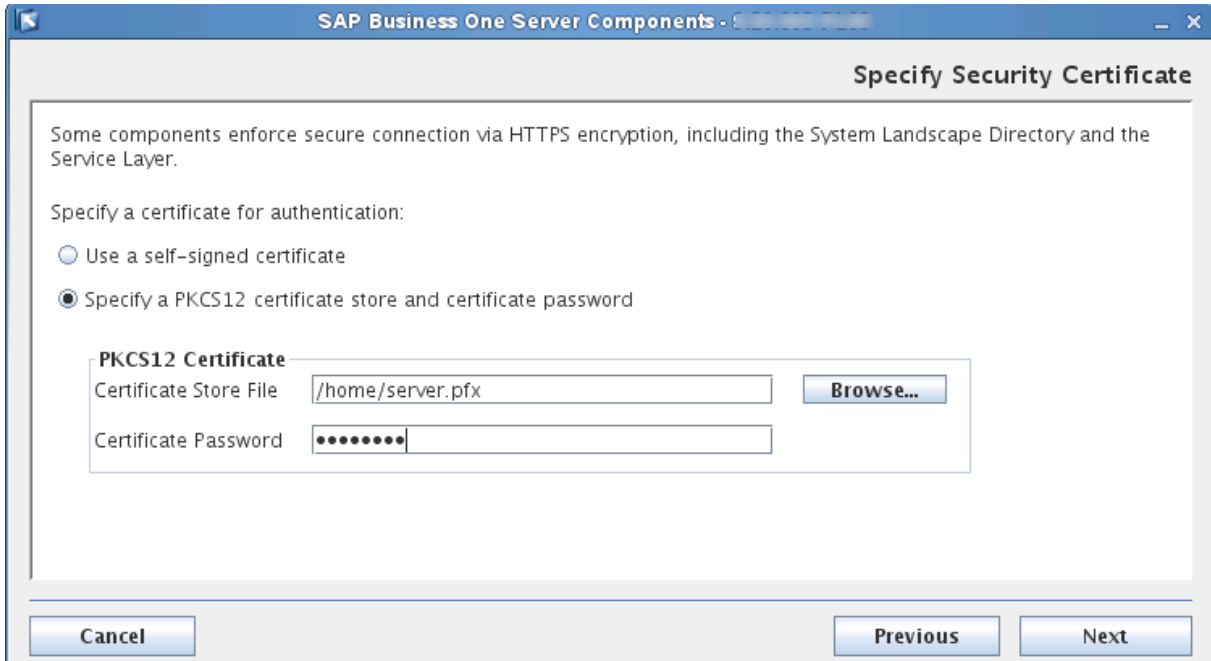
- SAP Business One Sales mobile app
- SAP Business One Service mobile app
- Cloud Control Center for SAP Business One

However, this will not happen in the SAP Business One client because of filtering functionality.

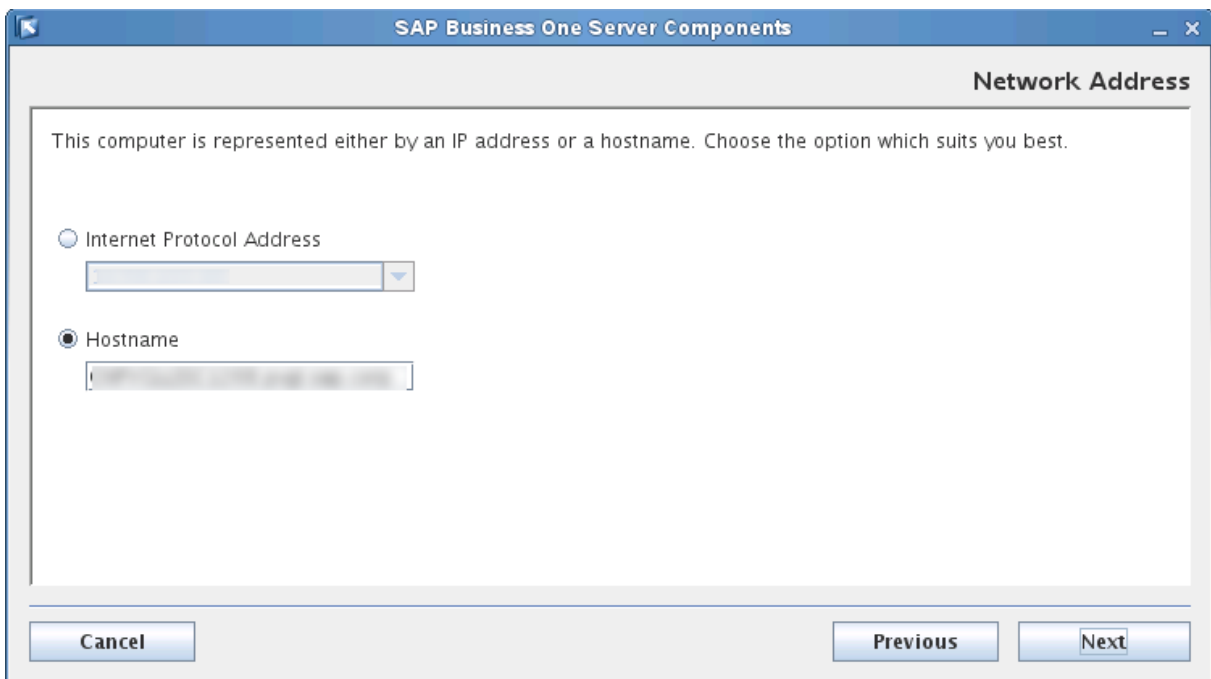
Security Certificates

During the installation, you can select to import a certificate store file (*Specify a PKCS12 certificate store and certificate password* option) or have the installer generate a self-signed certificate (*Use a self-signed certificate* option) for the System Landscape Directory, Analytics Platform and Mobile Service.

We recommend that you use a purchased certificate (for example, PKCS12 certificate).



If you choose the *Use a self-signed certificate* option, be sure to use the hostname rather than the IP address when specifying the server. The host name must be the Linux server hostname, which can be accessed by the mobile devices.



6.2 Required Licenses

The license required to use SAP Business One Service.

The SAP Business One Service mobile app is available for the following SAP Business One named user types with no additional license fee:

- Professional User
- Limited CRM User
- Mobile Service User

6.3 Creating Accounts and Changing Passwords for Mobile App Users

After you get a required license, you need to create a user account for an SAP Business One Service mobile app user in the SAP Business One client.

Procedure

1. From the SAP Business One *Main Menu*, choose **Administration > Setup > General > Users** to create a new user.

i Note

Deselect both *Superuser* and *Mobile User*.

2. Import the license file, and assign the license type to this new user.
3. Grant authorizations to the user.
 1. From the SAP Business One *Main Menu*, choose **Administration > System Initialization > Authorizations > General Authorizations > Users**.
 2. Select the user and grant authorizations.

→ Recommendation

It is highly recommended that you grant the following authorizations to mobile app users.

You can use the *Copy Authorizations* option to copy the authorizations that you have set for one user to others.

| Subject | Authorization | Effective Authorization |
|--------------|------------------------|-------------------------|
| General | Various Authorizations | Various Authorizations |
| Send Message | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|---|----------------------|--------------------------------|
| Print Layout Designer | No Authorization | No Authorization |
| Change Default Report | Full Authorization | Full Authorization |
| Query Print Layout... | Full Authorization | Full Authorization |
| Document Settings | Full Authorization | Full Authorization |
| Edit Document Tables | Full Authorization | Full Authorization |
| Access to Confidential Accounts | Full Authorization | Full Authorization |
| Account Balances | Full Authorization | Full Authorization |
| BP Balances | Full Authorization | Full Authorization |
| Access to Masked Data | Full Authorization | Full Authorization |
| Employee ID No. | Full Authorization | Full Authorization |
| Employee Passport No. | Full Authorization | Full Authorization |
| BP ID No. 2 | Full Authorization | Full Authorization |
| Unformatted Text | Full Authorization | Full Authorization |
| MS-EXCEL | Full Authorization | Full Authorization |
| MS-WORD | Full Authorization | Full Authorization |
| Period Status: Unlocked Except Sales | Full Authorization | Full Authorization |
| Period Status: Closing Period | Full Authorization | Full Authorization |
| Launch Application... | Full Authorization | Full Authorization |
| Drag & Relate | Full Authorization | Full Authorization |
| Sales - A/R | Full Authorization | Full Authorization |
| Purchasing - A/P | Full Authorization | Full Authorization |
| Business Partners | Full Authorization | Full Authorization |
| Inventory | Full Authorization | Full Authorization |
| Production | Full Authorization | Full Authorization |
| Financials | Full Authorization | Full Authorization |
| Service | Full Authorization | Full Authorization |
| Renaming Fields | Full Authorization | Full Authorization |
| Access Log | Full Authorization | Full Authorization |
| Change Log... | Full Authorization | Full Authorization |
| Edit Form UI... | No Authorization | No Authorization |
| Organize My Menu | Full Authorization | Full Authorization |
| Cancel Marketing Documents by Generating Cancellation Documents | Full Authorization | Full Authorization |
| Cancel Other Documents | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|---------------------------------------|------------------------|--------------------------------|
| Close Document | Full Authorization | Full Authorization |
| Change Field Labels | Full Authorization | Full Authorization |
| Document Manual Numbering | No Authorization | No Authorization |
| Relationship Map | Full Authorization | Full Authorization |
| Translations | Full Authorization | Full Authorization |
| Future Posting Date in Documents | Full Authorization | Full Authorization |
| Logger Settings | Full Authorization | Full Authorization |
| Electronic File Manager | Full Authorization | Full Authorization |
| SAP HANA Database Client Enablement | Full Authorization | Full Authorization |
| Apps for the version for SAP HANA | No Authorization | No Authorization |
| Disable DI API Permission Check | No Authorization | No Authorization |
| Customization Tools | Full Authorization | Full Authorization |
| User-Defined Values - Setup | Full Authorization | Full Authorization |
| User-Defined Fields - Management | Full Authorization | Full Authorization |
| Execute Commands | Full Authorization | Full Authorization |
| User-Defined Object Registration | Full Authorization | Full Authorization |
| Administration | Various Authorizations | Various Authorizations |
| Exchange Rates and Indexes | No Authorization | No Authorization |
| System Initialization | Various Authorizations | Various Authorizations |
| Company Details | No Authorization | No Authorization |
| Allow Stock Release Without Item Cost | No Authorization | No Authorization |
| Mask Credit Card Number | No Authorization | No Authorization |
| General Settings | No Authorization | No Authorization |
| Cash Flow | No Authorization | No Authorization |
| VAT Report Settings | No Authorization | No Authorization |
| Map Services | No Authorization | No Authorization |
| Posting Period | No Authorization | No Authorization |
| Change Period Status | No Authorization | No Authorization |
| Document Numbering | Read-Only | Read-Only |
| Document Settings | Full Authorization | Full Authorization |
| Max. Under/Over Payment | Full Authorization | Full Authorization |
| Allow Future Posting | Full Authorization | Full Authorization |
| Print Preferences | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|----------------------|--------------------------------|
| Menu Alias for Searching | No Authorization | No Authorization |
| Menu Structure | No Authorization | No Authorization |
| Opening Balances | No Authorization | No Authorization |
| G/L Accounts Opening Balance | No Authorization | No Authorization |
| Business Partners Opening Balance | No Authorization | No Authorization |
| Numbering Series | Full Authorization | Full Authorization |
| Series Lock | Full Authorization | Full Authorization |
| Series - Group No. 1 | Full Authorization | Full Authorization |
| Series - Group No. 2 | Full Authorization | Full Authorization |
| Series - Group No. 3 | Full Authorization | Full Authorization |
| Series - Group No. 4 | Full Authorization | Full Authorization |
| Series - Group No. 5 | Full Authorization | Full Authorization |
| Series - Group No. 6 | Full Authorization | Full Authorization |
| Series - Group No. 7 | Full Authorization | Full Authorization |
| Series - Group No. 8 | Full Authorization | Full Authorization |
| Series - Group No. 9 | Full Authorization | Full Authorization |
| Series - Group No. 10 | Full Authorization | Full Authorization |
| Copy from Unauthorized Series Group | Full Authorization | Full Authorization |
| E-Mail Settings | Full Authorization | Full Authorization |
| Implementation Tasks | No Authorization | No Authorization |
| Implementation Tasks | No Authorization | No Authorization |
| Implementation Project | No Authorization | No Authorization |
| Tooltip Preview | No Authorization | No Authorization |
| Setup | Full Authorization | Full Authorization |
| General | Full Authorization | Full Authorization |
| Users | Full Authorization | Full Authorization |
| Change My Personal Settings | Full Authorization | Full Authorization |
| User Defaults | Full Authorization | Full Authorization |
| Microsoft Windows user account does not exist | Full Authorization | Full Authorization |
| Sales Employees/Buyers | Full Authorization | Full Authorization |
| Territories | Full Authorization | Full Authorization |
| Commission Groups | Full Authorization | Full Authorization |
| Predefined Text | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|------------------------------------|------------------------|--------------------------------|
| Languages | Full Authorization | Full Authorization |
| Reference Field Links | Full Authorization | Full Authorization |
| Freight | Full Authorization | Full Authorization |
| Message Preferences | Full Authorization | Full Authorization |
| Report and Layout Manager | Full Authorization | Full Authorization |
| Dashboard Manager | Full Authorization | Full Authorization |
| Dashboard Parameters | Full Authorization | Full Authorization |
| Crystal Server Configuration | Full Authorization | Full Authorization |
| SAP Links | Full Authorization | Full Authorization |
| SAP HANA Model Management | Full Authorization | Full Authorization |
| Financials | Various Authorizations | Various Authorizations |
| Edit Chart of Accounts | No Authorization | No Authorization |
| G/L Account Determination | No Authorization | No Authorization |
| G/L Account Determination | No Authorization | No Authorization |
| Determination Criteria - Resources | No Authorization | No Authorization |
| Currencies | Read-Only | Read-Only |
| Indexes | No Authorization | No Authorization |
| Transaction Codes | No Authorization | No Authorization |
| Projects | Read-Only | Read-Only |
| Period Indicators | No Authorization | No Authorization |
| Doubtful Debts | No Authorization | No Authorization |
| Tax | Various Authorizations | Various Authorizations |
| Tax Code Determination | No Authorization | No Authorization |
| Sales Tax Jurisdiction Types | No Authorization | No Authorization |
| Sales Tax Jurisdictions | No Authorization | No Authorization |
| Sales Tax Codes | Read-Only | Read-Only |
| Fixed Assets | No Authorization | No Authorization |
| Account Determination | No Authorization | No Authorization |
| Depreciation Types | No Authorization | No Authorization |
| Depreciation Areas | No Authorization | No Authorization |
| Asset Classes | No Authorization | No Authorization |
| Attribute Groups | No Authorization | No Authorization |
| Cash Flow Line Items | No Authorization | No Authorization |
| Financial KPI Factors | No Authorization | No Authorization |
| Expense Types | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|-------------------------------|------------------------|--------------------------------|
| Opportunities | Full Authorization | Full Authorization |
| Opportunity Stages | Full Authorization | Full Authorization |
| Partners | Full Authorization | Full Authorization |
| Competitors | Full Authorization | Full Authorization |
| Relationships | Full Authorization | Full Authorization |
| Sales | Full Authorization | Full Authorization |
| ATP Checking Rule List | Full Authorization | Full Authorization |
| Purchasing | No Authorization | No Authorization |
| Landed Costs | No Authorization | No Authorization |
| Business Partners | Various Authorizations | Various Authorizations |
| Countries | Read-Only | Read-Only |
| Address Formats | No Authorization | No Authorization |
| Customer Groups | Read-Only | Read-Only |
| Vendor Groups | No Authorization | No Authorization |
| Business Partner Properties | No Authorization | No Authorization |
| Business Partner Priorities | No Authorization | No Authorization |
| Dunning Levels | No Authorization | No Authorization |
| Dunning Terms | No Authorization | No Authorization |
| Payment Terms | Full Authorization | Full Authorization |
| Cash Discount | Full Authorization | Full Authorization |
| Define Late Payments Fees | Full Authorization | Full Authorization |
| Payment Blocks | No Authorization | No Authorization |
| Target Group | No Authorization | No Authorization |
| Banking | No Authorization | No Authorization |
| Banks | No Authorization | No Authorization |
| House Bank Accounts | No Authorization | No Authorization |
| Credit Cards | No Authorization | No Authorization |
| Credit Card Payment | No Authorization | No Authorization |
| Credit Card Payment Methods | No Authorization | No Authorization |
| Credit Vendors | No Authorization | No Authorization |
| Bank Charges Allocation Codes | No Authorization | No Authorization |
| Payment Methods | No Authorization | No Authorization |
| Inventory | Various Authorizations | Various Authorizations |
| Item Groups | Full Authorization | Full Authorization |
| Item Properties | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|------------------------------------|----------------------|--------------------------------|
| Warehouses | Read-Only | Read-Only |
| Enable and Disable Bin Locations | No Authorization | No Authorization |
| Activate and Deactivate Warehouse | No Authorization | No Authorization |
| Units of Measure | Read-Only | Read-Only |
| Unit of Measure Groups | No Authorization | No Authorization |
| Length and Width | No Authorization | No Authorization |
| Weight | No Authorization | No Authorization |
| Customs Groups | No Authorization | No Authorization |
| Manufacturers | No Authorization | No Authorization |
| Shipping Types | Full Authorization | Full Authorization |
| Locations | No Authorization | No Authorization |
| Inventory Cycles | No Authorization | No Authorization |
| Cycle Count Determination | No Authorization | No Authorization |
| Package Types | No Authorization | No Authorization |
| Bin Locations | No Authorization | No Authorization |
| Bin Location Field Activation | No Authorization | No Authorization |
| Bin Location Attribute Codes | No Authorization | No Authorization |
| Warehouse Sublevel Codes | No Authorization | No Authorization |
| Warehouse Sublevel Code Management | No Authorization | No Authorization |
| Resources | No Authorization | No Authorization |
| Resource Groups | No Authorization | No Authorization |
| Resource Properties | No Authorization | No Authorization |
| Service | Full Authorization | Full Authorization |
| Contract Templates | Full Authorization | Full Authorization |
| Queues | Full Authorization | Full Authorization |
| Project Management | No Authorization | No Authorization |
| Stages - Setup | No Authorization | No Authorization |
| Activity Type - Setup | No Authorization | No Authorization |
| Production | No Authorization | No Authorization |
| Route Stages | No Authorization | No Authorization |
| Data Import/Export | No Authorization | No Authorization |
| Data Import | No Authorization | No Authorization |
| Import from Excel | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Import Transactions from SAP Business One | No Authorization | No Authorization |
| Import Fixed Asset Master Data from Microsoft Excel | No Authorization | No Authorization |
| Financial Template Import Wizard | No Authorization | No Authorization |
| Comprehensive Import | No Authorization | No Authorization |
| Data Export | No Authorization | No Authorization |
| Utilities | Various Authorizations | Various Authorizations |
| Period-End Closing | Full Authorization | Full Authorization |
| Update Control Report | No Authorization | No Authorization |
| Check Document Numbering - Selection Criteria | No Authorization | No Authorization |
| Data Archive Wizard | No Authorization | No Authorization |
| Data Archive Wizard Execution | No Authorization | No Authorization |
| Master Data Cleanup Wizard | No Authorization | No Authorization |
| Change Logs Cleanup | No Authorization | No Authorization |
| Execute Change Logs Cleanup | No Authorization | No Authorization |
| Manual Master Data Series Converter | No Authorization | No Authorization |
| Revalidate Manual Internal Reconciliations | No Authorization | No Authorization |
| Transfer Posting Correction Wizard | No Authorization | No Authorization |
| Restore | No Authorization | No Authorization |
| Restore G/L Account and Business Partner Balances | No Authorization | No Authorization |
| Restore Item Balances | No Authorization | No Authorization |
| Restore Numbering File | No Authorization | No Authorization |
| Restore System Reports | No Authorization | No Authorization |
| Restore Stored Procedures | No Authorization | No Authorization |
| UI Configuration Template | No Authorization | No Authorization |
| Approval Process | Various Authorizations | Various Authorizations |
| Approval Stages | Read-Only | Read-Only |
| Approval Templates | Read-Only | Read-Only |
| Approval Status Report | Full Authorization | Full Authorization |
| Approval Decision Report | Full Authorization | Full Authorization |
| Workflow | No Authorization | No Authorization |
| Workflow Instance | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|--------------------------------|
| Workflow Worklist | No Authorization | No Authorization |
| Workflow Manager | No Authorization | No Authorization |
| Workflow Tracking | No Authorization | No Authorization |
| Workflow Template | No Authorization | No Authorization |
| Alerts Management | No Authorization | No Authorization |
| BI OnDemand Integration Configuration | No Authorization | No Authorization |
| Financials | Various Authorizations | Various Authorizations |
| Chart of Accounts | No Authorization | No Authorization |
| Journal Entry | No Authorization | No Authorization |
| Update Posting Data | No Authorization | No Authorization |
| Confirm Entry with Multiple Currencies | No Authorization | No Authorization |
| Confirm Unbalanced FC Entry | No Authorization | No Authorization |
| Confirm Row Posting Date Editing | No Authorization | No Authorization |
| Allow Row Doc. Date Editing | No Authorization | No Authorization |
| Confirm SC Editing | No Authorization | No Authorization |
| Journal Vouchers | No Authorization | No Authorization |
| Posting Templates | No Authorization | No Authorization |
| Recurring Postings | No Authorization | No Authorization |
| Reverse Transactions | No Authorization | No Authorization |
| Exchange Rate Differences | No Authorization | No Authorization |
| Conversion Differences | No Authorization | No Authorization |
| Financial Report Templates | No Authorization | No Authorization |
| Process Checklist | No Authorization | No Authorization |
| Journal Voucher Report | No Authorization | No Authorization |
| Fixed Assets | No Authorization | No Authorization |
| Asset Master Data | No Authorization | No Authorization |
| Capitalization | No Authorization | No Authorization |
| Capitalization Credit Memo | No Authorization | No Authorization |
| Retirement | No Authorization | No Authorization |
| Transfer | No Authorization | No Authorization |
| Manual Depreciation | No Authorization | No Authorization |
| Depreciation Run | No Authorization | No Authorization |
| Asset Revaluation | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|--------------------------------|
| Fiscal Year Change | No Authorization | No Authorization |
| Fixed Asset Reports | No Authorization | No Authorization |
| Asset Depreciation Forecast Report | No Authorization | No Authorization |
| Asset History Sheet | No Authorization | No Authorization |
| Asset Status Report | No Authorization | No Authorization |
| Asset Transaction Report | No Authorization | No Authorization |
| Internal Reconciliations | No Authorization | No Authorization |
| Reconciliation | No Authorization | No Authorization |
| Budget Setup | No Authorization | No Authorization |
| Budget Scenarios - Setup | No Authorization | No Authorization |
| Import Budget Scenarios | No Authorization | No Authorization |
| Budget Distribution Methods - Setup | No Authorization | No Authorization |
| Budget | No Authorization | No Authorization |
| Confirm Budget Deviation | No Authorization | No Authorization |
| Cost Accounting | No Authorization | No Authorization |
| Dimensions | No Authorization | No Authorization |
| Cost Centers - Setup | No Authorization | No Authorization |
| Distribution Rules - Setup | No Authorization | No Authorization |
| Table of Cost Centers and Distribution Rules | No Authorization | No Authorization |
| Cost Center Report | No Authorization | No Authorization |
| Distribution Report | No Authorization | No Authorization |
| Cost Accounting Summary Report | No Authorization | No Authorization |
| Budget Versus Cost Accounting | No Authorization | No Authorization |
| Accrual Types | No Authorization | No Authorization |
| Cost Accounting Reconciliation Report | No Authorization | No Authorization |
| Journal Entry for Cost Accounting Adjustment | No Authorization | No Authorization |
| Cost Elements | No Authorization | No Authorization |
| Financial Reports | Various Authorizations | Various Authorizations |
| Electronic Reports | No Authorization | No Authorization |
| Accounting | Various Authorizations | Various Authorizations |
| G/L Accounts and Business Partners | No Authorization | No Authorization |
| General Ledger | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|--------------------------------|
| Aging | Various Authorizations | Various Authorizations |
| Customer Receivables Aging | Full Authorization | Full Authorization |
| Vendor Liabilities Aging | No Authorization | No Authorization |
| Transaction Journal Report | No Authorization | No Authorization |
| Transaction Report by Projects | No Authorization | No Authorization |
| Document Journal | No Authorization | No Authorization |
| Cash Flow Reference Report | No Authorization | No Authorization |
| Tax | No Authorization | No Authorization |
| Tax Report | No Authorization | No Authorization |
| EU Sales Report | No Authorization | No Authorization |
| Withholding Tax Report - Selection Criteria | No Authorization | No Authorization |
| Tax Reconciliation Report - Selection Criteria | No Authorization | No Authorization |
| Tax Declaration Box Report | No Authorization | No Authorization |
| Immediate Information Supply - Selection Criteria | No Authorization | No Authorization |
| Immediate Information Supply Annual - Selection Criteria | No Authorization | No Authorization |
| Customer Open Document List | No Authorization | No Authorization |
| Financial | No Authorization | No Authorization |
| Balance Sheet | No Authorization | No Authorization |
| Trial Balance | No Authorization | No Authorization |
| Profit and Loss Statement | No Authorization | No Authorization |
| Cash Flow | No Authorization | No Authorization |
| Include Projected Postings by Others | No Authorization | No Authorization |
| E-Balance Generation Wizard | No Authorization | No Authorization |
| Statement of Cash Flows | No Authorization | No Authorization |
| Cash Flow Forecast | No Authorization | No Authorization |
| Comparison | No Authorization | No Authorization |
| Balance Sheet Comparison | No Authorization | No Authorization |
| Trial Balance Comparison | No Authorization | No Authorization |
| Profit and Loss Statement Comparison | No Authorization | No Authorization |
| Budget Setup | No Authorization | No Authorization |
| Budget Report | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|----------------------|--------------------------------|
| Balance Sheet Budget Report | No Authorization | No Authorization |
| Trial Balance Budget Report | No Authorization | No Authorization |
| Profit and Loss Statement Budget Report | No Authorization | No Authorization |
| Opportunities | Full Authorization | Full Authorization |
| Opportunity | Full Authorization | Full Authorization |
| Gross Profit | Full Authorization | Full Authorization |
| Special Opportunity Authorizations | Full Authorization | Full Authorization |
| Edit Closing Date | Full Authorization | Full Authorization |
| Opportunities Reports | Full Authorization | Full Authorization |
| Electronic Reports | Full Authorization | Full Authorization |
| Management Reports | Full Authorization | Full Authorization |
| General Reports | Full Authorization | Full Authorization |
| Status Reports | Full Authorization | Full Authorization |
| Opportunities Pipeline | Full Authorization | Full Authorization |
| Dynamic Opportunity Analysis | Full Authorization | Full Authorization |
| Opportunity List | Full Authorization | Full Authorization |
| Sales - A/R | Full Authorization | Full Authorization |
| Blanket Agreement | Full Authorization | Full Authorization |
| Blanket Agreement Status | Full Authorization | Full Authorization |
| Sales Quotation | Full Authorization | Full Authorization |
| Sales Order | Full Authorization | Full Authorization |
| Delivery | Full Authorization | Full Authorization |
| Return Request | Full Authorization | Full Authorization |
| Return | Full Authorization | Full Authorization |
| A/R Down Payment Request | Full Authorization | Full Authorization |
| A/R Down Payment Invoice | Full Authorization | Full Authorization |
| A/R Invoice | Full Authorization | Full Authorization |
| A/R Invoice + Payment | Full Authorization | Full Authorization |
| A/R Credit Memo | Full Authorization | Full Authorization |
| A/R Reserve Invoice | Full Authorization | Full Authorization |
| Recurring Transactions | Full Authorization | Full Authorization |
| Recurring Transactions Templates | Full Authorization | Full Authorization |
| Document Generation Wizard | Full Authorization | Full Authorization |
| Available-to-Promise Check | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|--|----------------------|--------------------------------|
| Delivery Schedule Management | Full Authorization | Full Authorization |
| Fixed Qty/Date | Full Authorization | Full Authorization |
| Document Draft | Full Authorization | Full Authorization |
| Document Drafts Report | Full Authorization | Full Authorization |
| Remove Document Drafts | Full Authorization | Full Authorization |
| Document Printing | Full Authorization | Full Authorization |
| Dunning Wizard | Full Authorization | Full Authorization |
| Execute a dunning run | Full Authorization | Full Authorization |
| Gross Profit Recalculation Wizard | Full Authorization | Full Authorization |
| Execute Gross Profit Recalculation Run | Full Authorization | Full Authorization |
| Sales Reports | Full Authorization | Full Authorization |
| Electronic Reports | Full Authorization | Full Authorization |
| Sales Analysis | Full Authorization | Full Authorization |
| Backorder - Selection Criteria | Full Authorization | Full Authorization |
| Blanket Agreement | Full Authorization | Full Authorization |
| Blanket Agreement Fulfillment Report | Full Authorization | Full Authorization |
| View Related Blanket Agreement from BP Master Data | Full Authorization | Full Authorization |
| Annual Sales Analysis (by Quarter) | Full Authorization | Full Authorization |
| Monthly Customer Status Report | Full Authorization | Full Authorization |
| Monthly Sales Analysis | Full Authorization | Full Authorization |
| Tax Only | Full Authorization | Full Authorization |
| Change Row Amounts | Full Authorization | Full Authorization |
| Change Sales Employee | Full Authorization | Full Authorization |
| Sales Employee Update | Full Authorization | Full Authorization |
| Confirm Credit Line Deviation | Full Authorization | Full Authorization |
| Confirm Debt Line Deviation | Full Authorization | Full Authorization |
| Confirm Stock Limit Deviation | Full Authorization | Full Authorization |
| Partial Delivery | Full Authorization | Full Authorization |
| Document Confirmation | Full Authorization | Full Authorization |
| Documents with Zero Amounts | Full Authorization | Full Authorization |
| Allow to Change Reconciliation Accounts | Full Authorization | Full Authorization |
| Gross Profit | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|--------------------------------|
| Change Tax Rate | Full Authorization | Full Authorization |
| Modify Posted A/R Documents | Full Authorization | Full Authorization |
| Purchasing - A/P | Various Authorizations | Various Authorizations |
| Blanket Agreement | No Authorization | No Authorization |
| Blanket Agreement Status | No Authorization | No Authorization |
| Purchase Request | No Authorization | No Authorization |
| Requester Change | No Authorization | No Authorization |
| Purchase Quotation | No Authorization | No Authorization |
| Purchase Order | No Authorization | No Authorization |
| Split Purchase Order | No Authorization | No Authorization |
| Goods Receipt PO | No Authorization | No Authorization |
| Goods Return Request | No Authorization | No Authorization |
| Goods Return | No Authorization | No Authorization |
| A/P Down Payment Request | No Authorization | No Authorization |
| A/P Down Payment Invoice | No Authorization | No Authorization |
| A/P Invoice | No Authorization | No Authorization |
| A/P Credit Memo | No Authorization | No Authorization |
| A/P Reserve Invoice | No Authorization | No Authorization |
| Landed Costs | No Authorization | No Authorization |
| Procurement Confirmation Wizard | No Authorization | No Authorization |
| Purchase Quotation Generation Wizard | No Authorization | No Authorization |
| Tax Changes | No Authorization | No Authorization |
| Purchasing Reports | No Authorization | No Authorization |
| Electronic Reports | No Authorization | No Authorization |
| Purchase Analysis | No Authorization | No Authorization |
| Purchase Request Report | No Authorization | No Authorization |
| Quotation Comparison | No Authorization | No Authorization |
| Blanket Agreement | No Authorization | No Authorization |
| Blanket Agreement Fulfillment Report | No Authorization | No Authorization |
| View Related Blanket Agreement from BP Master Data | No Authorization | No Authorization |
| Tax Only | Full Authorization | Full Authorization |
| Modify Posted A/P Documents | Full Authorization | Full Authorization |
| Business Partners | Various Authorizations | Various Authorizations |

| Subject | Authorization | Effective Authorization |
|------------------------------------|------------------------|--------------------------------|
| Adding Business Partner | Full Authorization | Full Authorization |
| Adding Customer/Vendor Master Data | Full Authorization | Full Authorization |
| Adding Lead BP | Full Authorization | Full Authorization |
| Business Partner Master Data | Full Authorization | Full Authorization |
| Sales Order Balance | Full Authorization | Full Authorization |
| Delivery Balance | Full Authorization | Full Authorization |
| Goods Receipt PO Balance | No Authorization | No Authorization |
| Purchase Order Balance | No Authorization | No Authorization |
| Change Sales Employee | Full Authorization | Full Authorization |
| Active | Full Authorization | Full Authorization |
| Inactive | Full Authorization | Full Authorization |
| Remove Business Partner | No Authorization | No Authorization |
| Campaign Generation Wizard | No Authorization | No Authorization |
| Execute Campaign | No Authorization | No Authorization |
| Campaign | No Authorization | No Authorization |
| Business Partner Type | Full Authorization | Full Authorization |
| Customers | Full Authorization | Full Authorization |
| Vendors | Full Authorization | Full Authorization |
| Leads | Full Authorization | Full Authorization |
| Activity | Full Authorization | Full Authorization |
| Delete Activity | Full Authorization | Full Authorization |
| Internal Reconciliations | No Authorization | No Authorization |
| Reconciliation | No Authorization | No Authorization |
| Manage Previous Reconciliations | No Authorization | No Authorization |
| Business Partner Reports | Various Authorizations | Various Authorizations |
| Electronic Reports | Read-Only | Read-Only |
| Activities Overview | Full Authorization | Full Authorization |
| Inactive Customers | No Authorization | No Authorization |
| Dunning History Report | No Authorization | No Authorization |
| Campaigns List | No Authorization | No Authorization |
| Sent Emails Report | No Authorization | No Authorization |
| Credit Limit by Customer | No Authorization | No Authorization |
| Banking | Various Authorizations | Various Authorizations |
| Incoming Payments | Various Authorizations | Various Authorizations |

| Subject | Authorization | Effective Authorization |
|--|----------------------|--------------------------------|
| Incoming Payments | Read-Only | Read-Only |
| Cash Receipt | No Authorization | No Authorization |
| Check Register | No Authorization | No Authorization |
| Credit Card Management | No Authorization | No Authorization |
| Credit Card Summary | No Authorization | No Authorization |
| Deposits | No Authorization | No Authorization |
| Deposit | No Authorization | No Authorization |
| Postdated Check Deposit | No Authorization | No Authorization |
| Postdated Credit Voucher Deposit | No Authorization | No Authorization |
| Outgoing Payments | No Authorization | No Authorization |
| Outgoing Payments | No Authorization | No Authorization |
| Payment Draft | No Authorization | No Authorization |
| Checks for Payment | No Authorization | No Authorization |
| Void Checks for Payment | No Authorization | No Authorization |
| Update Pay To | No Authorization | No Authorization |
| Create Check for Payment Without Journal Entry | No Authorization | No Authorization |
| Print Check for Payment | No Authorization | No Authorization |
| Print Check for Payment | No Authorization | No Authorization |
| Print Voided Checks for Payment | No Authorization | No Authorization |
| Reprint Checks for Previously Printed Payment | No Authorization | No Authorization |
| Payment Drafts Report | No Authorization | No Authorization |
| Remove Payment Drafts | No Authorization | No Authorization |
| Checks for Payment Draft | No Authorization | No Authorization |
| Checks for Payment Drafts Report | No Authorization | No Authorization |
| Remove Checks for Payment Drafts | No Authorization | No Authorization |
| Payment System | No Authorization | No Authorization |
| Payment Wizard | No Authorization | No Authorization |
| Executed | No Authorization | No Authorization |
| Payment Engine - Bank File Generation | No Authorization | No Authorization |
| Payment Orders | No Authorization | No Authorization |
| Bank Statements and External Reconciliations | No Authorization | No Authorization |
| Process External Bank Statement | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Reconciliation | No Authorization | No Authorization |
| Manage Previous External Reconciliations | No Authorization | No Authorization |
| Check and Restore Previous External Reconciliations | No Authorization | No Authorization |
| Check Number Confirmation | No Authorization | No Authorization |
| Electronic Reports | No Authorization | No Authorization |
| Payment Orders Report by Business Partner | No Authorization | No Authorization |
| Payment Orders Report by Payment Run | No Authorization | No Authorization |
| Inventory | Various Authorizations | Various Authorizations |
| Item Master Data | Read-Only | Read-Only |
| Active | No Authorization | No Authorization |
| Inactive | No Authorization | No Authorization |
| Valuation Method | Read-Only | Read-Only |
| Remove Item Master Data | No Authorization | No Authorization |
| Bar Codes | Full Authorization | Full Authorization |
| Bin Locations | No Authorization | No Authorization |
| Bin Location Master Data | No Authorization | No Authorization |
| Activate and Deactivate Bin Location | No Authorization | No Authorization |
| Transaction Restrictions | No Authorization | No Authorization |
| Bin Location Management | No Authorization | No Authorization |
| Bin Location Code Modification | No Authorization | No Authorization |
| Item Management | Various Authorizations | Various Authorizations |
| Item Serial Numbers | Full Authorization | Full Authorization |
| Serial Number Management | Full Authorization | Full Authorization |
| Serial Number Details | Full Authorization | Full Authorization |
| Batches | No Authorization | No Authorization |
| Batch Management | No Authorization | No Authorization |
| Batch Details | No Authorization | No Authorization |
| Alternative Items | No Authorization | No Authorization |
| Business Partner Catalog Numbers | No Authorization | No Authorization |
| Global Update to BP Catalog Numbers | No Authorization | No Authorization |
| Inventory Valuation Method | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Inventory Transactions | No Authorization | No Authorization |
| Goods Receipt | No Authorization | No Authorization |
| Goods Issue | No Authorization | No Authorization |
| Inventory Transfer Request | No Authorization | No Authorization |
| Inventory Transfer | No Authorization | No Authorization |
| Inventory Counting Transactions | No Authorization | No Authorization |
| Inventory Counting | No Authorization | No Authorization |
| Special Inventory Counting Authorizations | No Authorization | No Authorization |
| Modify Inventory Counting | No Authorization | No Authorization |
| Freeze Items | No Authorization | No Authorization |
| Inventory Posting | No Authorization | No Authorization |
| Inventory Opening Balance | No Authorization | No Authorization |
| Saved Queries - Group No. 21 | No Authorization | No Authorization |
| Saved Queries - Group No. 22 | No Authorization | No Authorization |
| Saved Queries - Group No. 23 | No Authorization | No Authorization |
| Saved Queries - Group No. 24 | No Authorization | No Authorization |
| Cycle Count Recommendations | No Authorization | No Authorization |
| Inventory Revaluation | No Authorization | No Authorization |
| Price Lists | Various Authorizations | Various Authorizations |
| Price Lists | Full Authorization | Full Authorization |
| Price List - Group No. 1 | Full Authorization | Full Authorization |
| Price List - Group No. 2 | Full Authorization | Full Authorization |
| Price List - Group No. 3 | Full Authorization | Full Authorization |
| Price List - Group No. 4 | Full Authorization | Full Authorization |
| Last Evaluated Price | Full Authorization | Full Authorization |
| Last Purchase Price | Full Authorization | Full Authorization |
| Item Cost | Full Authorization | Full Authorization |
| Production Std. Cost | No Authorization | No Authorization |
| Period and Volume Discounts | Full Authorization | Full Authorization |
| Special Prices | Full Authorization | Full Authorization |
| Special Prices for Business Partners | Full Authorization | Full Authorization |
| Copy Special Prices to Selection Criteria | Full Authorization | Full Authorization |
| Update Special Prices Globally | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|--|----------------------|--------------------------------|
| Discount Groups | Full Authorization | Full Authorization |
| Update Parent Item Prices Globally | Full Authorization | Full Authorization |
| Avg./Std and Srl/Btch Cost | Full Authorization | Full Authorization |
| Prices Update Wizard | No Authorization | No Authorization |
| Execute Prices Update | No Authorization | No Authorization |
| Pick and Pack | No Authorization | No Authorization |
| Pick Pack and Production Manager | No Authorization | No Authorization |
| Pick List | No Authorization | No Authorization |
| Inventory Reports | No Authorization | No Authorization |
| Electronic Reports | No Authorization | No Authorization |
| Items List | No Authorization | No Authorization |
| Last Prices Report | No Authorization | No Authorization |
| Inactive Items | No Authorization | No Authorization |
| Inventory Posting List | No Authorization | No Authorization |
| Inventory Status | No Authorization | No Authorization |
| Inventory in Warehouse Report | No Authorization | No Authorization |
| Inventory Audit Report | No Authorization | No Authorization |
| Batches and Serials Inventory Audit Report | No Authorization | No Authorization |
| Inventory Valuation Simulation Report | No Authorization | No Authorization |
| Batch Number Transactions Report | No Authorization | No Authorization |
| Serial Number Transactions Report | No Authorization | No Authorization |
| Bin Location List | No Authorization | No Authorization |
| Bin Location Content List | No Authorization | No Authorization |
| Price Report | No Authorization | No Authorization |
| Discount Group Report | No Authorization | No Authorization |
| Inventory Counting Transactions Report | No Authorization | No Authorization |
| Inventory Valuation Method Report | No Authorization | No Authorization |
| Inventory Turnover Analysis | No Authorization | No Authorization |
| Inventory Status | No Authorization | No Authorization |
| Resources | No Authorization | No Authorization |
| Resource Master Data | No Authorization | No Authorization |
| Resource Capacity | No Authorization | No Authorization |
| Set Daily Internal Capacities | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|----------------------|--------------------------------|
| Production | No Authorization | No Authorization |
| Bill of Materials | No Authorization | No Authorization |
| Production Order | No Authorization | No Authorization |
| Receipt from Production | No Authorization | No Authorization |
| Issue for Production | No Authorization | No Authorization |
| Bill of Materials - Component Management | No Authorization | No Authorization |
| Production Std Cost Management | No Authorization | No Authorization |
| Production Std Cost Rollup | No Authorization | No Authorization |
| Production Std Cost Update | No Authorization | No Authorization |
| Production Cost Recalculation Wizard | No Authorization | No Authorization |
| Execute Production Cost Recalculation Run | No Authorization | No Authorization |
| Production Reports | No Authorization | No Authorization |
| Electronic Reports | No Authorization | No Authorization |
| Bill of Materials Report | No Authorization | No Authorization |
| MRP | No Authorization | No Authorization |
| Forecasts | No Authorization | No Authorization |
| MRP Wizard | No Authorization | No Authorization |
| Order Recommendation | No Authorization | No Authorization |
| MRP Reports | No Authorization | No Authorization |
| Electronic Reports | No Authorization | No Authorization |
| Service | Full Authorization | Full Authorization |
| Service Call | Full Authorization | Full Authorization |
| Special Service Call Authorizations | Full Authorization | Full Authorization |
| Change Status | Full Authorization | Full Authorization |
| Define Statuses | Full Authorization | Full Authorization |
| Reopen | Full Authorization | Full Authorization |
| Edit Created On/Closed On | Full Authorization | Full Authorization |
| Allow Service Without Contract | Full Authorization | Full Authorization |
| Allow Service Beyond Coverage Time | Full Authorization | Full Authorization |
| Allow Service Beyond Credit Limit | Full Authorization | Full Authorization |
| Equipment Card | Full Authorization | Full Authorization |
| Service Contract | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Change Status | Full Authorization | Full Authorization |
| Solutions Knowledge Base | Full Authorization | Full Authorization |
| Special Solution Authorizations | Full Authorization | Full Authorization |
| Change Status | Full Authorization | Full Authorization |
| Service Reports | Full Authorization | Full Authorization |
| Electronic Reports | Full Authorization | Full Authorization |
| Service Calls | Full Authorization | Full Authorization |
| Service Calls by Queue - Selection Criteria | Full Authorization | Full Authorization |
| Response Time by Assigned to - Selection Criteria | Full Authorization | Full Authorization |
| Average Closure Time | Full Authorization | Full Authorization |
| Service Contracts | Full Authorization | Full Authorization |
| Equipment Card Report | Full Authorization | Full Authorization |
| Service Monitor | Full Authorization | Full Authorization |
| Service Call Backlog | Full Authorization | Full Authorization |
| Human Resources | Various Authorizations | Various Authorizations |
| Employee Master Data | Read-Only | Read-Only |
| Time Sheet | No Authorization | No Authorization |
| Human Resources Reports | No Authorization | No Authorization |
| Electronic Reports | No Authorization | No Authorization |
| Employee List | No Authorization | No Authorization |
| Absence Report | No Authorization | No Authorization |
| Phone Book | No Authorization | No Authorization |
| Project Management | No Authorization | No Authorization |
| Project | No Authorization | No Authorization |
| Project Reports | No Authorization | No Authorization |
| Stage Analysis - Selection Criteria | No Authorization | No Authorization |
| Open Issues - Selection Criteria | No Authorization | No Authorization |
| Resources - Selection Criteria | No Authorization | No Authorization |
| Time Sheet - Selection Criteria | No Authorization | No Authorization |
| Reports | Various Authorizations | Various Authorizations |
| Sales and Purchasing | Full Authorization | Full Authorization |
| Open Items List | Full Authorization | Full Authorization |
| Sales Quotations | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Sales Orders | Full Authorization | Full Authorization |
| Deliveries | Full Authorization | Full Authorization |
| Return Requests | No Authorization | No Authorization |
| Returns | No Authorization | No Authorization |
| A/R Down Payments - Unpaid | Full Authorization | Full Authorization |
| A/R Down Payments - Not Yet Fully Applied | Full Authorization | Full Authorization |
| A/R Invoices | Full Authorization | Full Authorization |
| A/R Credit Memos | Full Authorization | Full Authorization |
| A/R Reserve Invoices - Unpaid | Full Authorization | Full Authorization |
| A/R Reserve Invoices - Not Yet Delivered | Full Authorization | Full Authorization |
| Purchase Quotations | No Authorization | No Authorization |
| Purchase Requests | No Authorization | No Authorization |
| Purchase Orders | No Authorization | No Authorization |
| Goods Receipt POs | No Authorization | No Authorization |
| Goods Return Requests | No Authorization | No Authorization |
| Goods Return | No Authorization | No Authorization |
| A/P Down Payments - Unpaid | No Authorization | No Authorization |
| A/P Down Payments - Not Yet Fully Applied | No Authorization | No Authorization |
| A/P Invoices | No Authorization | No Authorization |
| A/P Credit Memos | No Authorization | No Authorization |
| A/P Reserve Invoices - Unpaid | No Authorization | No Authorization |
| A/P Reserve Invoices - Not Yet Delivered | No Authorization | No Authorization |
| Inventory Transfer Requests | No Authorization | No Authorization |
| Production Orders | No Authorization | No Authorization |
| Missing Items | Full Authorization | Full Authorization |
| Query Generator | Various Authorizations | Various Authorizations |
| New Queries | No Authorization | No Authorization |
| Create/Edit Categories | No Authorization | No Authorization |
| Execute Non-select SQL Statement | Full Authorization | Full Authorization |
| Modify SQL Statement | No Authorization | No Authorization |
| Saved Queries - Group No.1 | No Authorization | No Authorization |
| Saved Queries - Group No.2 | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|--------------------------------|
| Saved Queries - Group No.3 | Read-Only | Read-Only |
| Saved Queries - Group No.4 | No Authorization | No Authorization |
| Saved Queries - Group No.5 | No Authorization | No Authorization |
| Saved Queries - Group No.6 | No Authorization | No Authorization |
| Saved Queries - Group No.7 | No Authorization | No Authorization |
| Saved Queries - Group No.8 | No Authorization | No Authorization |
| Saved Queries - Group No.9 | No Authorization | No Authorization |
| Saved Queries - Group No.10 | No Authorization | No Authorization |
| Saved Queries - Group No.11 | No Authorization | No Authorization |
| Saved Queries - Group No.12 | No Authorization | No Authorization |
| Saved Queries - Group No.13 | No Authorization | No Authorization |
| Saved Queries - Group No.14 | No Authorization | No Authorization |
| Saved Queries - Group No.15 | Read-Only | Read-Only |
| Query Wizard | No Authorization | No Authorization |
| Query Manager | No Authorization | No Authorization |
| Report Scheduling | No Authorization | No Authorization |
| Scheduled Report Overview | No Authorization | No Authorization |
| Report Execution Scheduler | No Authorization | No Authorization |
| Cockpit & Widget | No Authorization | No Authorization |
| Cockpit Management | No Authorization | No Authorization |
| General Widgets | No Authorization | No Authorization |
| Common Functions | No Authorization | No Authorization |
| Open Documents | No Authorization | No Authorization |
| Messages and Alerts | No Authorization | No Authorization |
| Browser | No Authorization | No Authorization |
| Dashboard Widget | No Authorization | No Authorization |
| KPI Widget | No Authorization | No Authorization |
| Widget Content | No Authorization | No Authorization |
| Analytics | Various Authorizations | Various Authorizations |
| Excel Report and Interactive Analysis Designer | No Authorization | No Authorization |
| Excel Reports | No Authorization | No Authorization |
| Customer Relationship Management | No Authorization | No Authorization |
| Sales Opportunities Report | No Authorization | No Authorization |
| Financials | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|----------------------|--------------------------------|
| Budget and Cost Accounting | No Authorization | No Authorization |
| Cost Center - Budget Versus Actual | No Authorization | No Authorization |
| Financial Accounting | No Authorization | No Authorization |
| Management Accounting | No Authorization | No Authorization |
| Financial Analysis-Transaction by Project | No Authorization | No Authorization |
| Inventory | No Authorization | No Authorization |
| Inventory by Item Group per Warehouse | No Authorization | No Authorization |
| Purchasing | No Authorization | No Authorization |
| Multi-Document Scenarios | No Authorization | No Authorization |
| Purchase Analysis Report | No Authorization | No Authorization |
| Single Document Transactions | No Authorization | No Authorization |
| Sales | No Authorization | No Authorization |
| Multi-Document Scenarios | No Authorization | No Authorization |
| Delivery Schedule | No Authorization | No Authorization |
| Sales Performance by Customer | No Authorization | No Authorization |
| Single Document Transactions | No Authorization | No Authorization |
| Semantic Layer | No Authorization | No Authorization |
| Purchasing | No Authorization | No Authorization |
| Multi-Document Scenarios | No Authorization | No Authorization |
| Average Purchasing Price Query | No Authorization | No Authorization |
| Statistics of on-time receipt | No Authorization | No Authorization |
| Purchase Order Fulfillment Cycle Time Query | No Authorization | No Authorization |
| On-time receipt analysis | No Authorization | No Authorization |
| Purchase return statistics | No Authorization | No Authorization |
| Vendor Balance Analysis Query | No Authorization | No Authorization |
| Single Document Transactions | No Authorization | No Authorization |
| A/P Correction Invoice and Reversal Details | No Authorization | No Authorization |
| A/P Correction Invoice and Reversal Header | No Authorization | No Authorization |
| A/P Credit Memo Details | No Authorization | No Authorization |
| A/P Credit Memo Header | No Authorization | No Authorization |
| A/P Invoice Details | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|----------------------|--------------------------------|
| A/P Invoice Header | No Authorization | No Authorization |
| A/P Reserve Invoice Details | No Authorization | No Authorization |
| A/P Reserve Invoice Header | No Authorization | No Authorization |
| Goods Receipt PO Details | No Authorization | No Authorization |
| Goods Receipt PO Header | No Authorization | No Authorization |
| Goods Return Details | No Authorization | No Authorization |
| Goods Return Header | No Authorization | No Authorization |
| Purchase Order Details | No Authorization | No Authorization |
| Purchase Order Header | No Authorization | No Authorization |
| Purchase Analysis by Document | No Authorization | No Authorization |
| Purchase Analysis | No Authorization | No Authorization |
| Vendor Payment Aging | No Authorization | No Authorization |
| Sales | No Authorization | No Authorization |
| Multi-Document Scenarios | No Authorization | No Authorization |
| Average Selling Price Query | No Authorization | No Authorization |
| Backorder Statistics | No Authorization | No Authorization |
| Customer Attrition Rate Prediction Query | No Authorization | No Authorization |
| Customer Open Balances And Credit Limit Comparison | No Authorization | No Authorization |
| Item Also Recommended Query | No Authorization | No Authorization |
| Item Recommendation Query | No Authorization | No Authorization |
| Statistics of on-time delivery | No Authorization | No Authorization |
| On-time delivery analysis | No Authorization | No Authorization |
| Sales order fulfillment cycle time analysis | No Authorization | No Authorization |
| Sales Return Statistics Query | No Authorization | No Authorization |
| Single Document Transactions | No Authorization | No Authorization |
| A/R Correction Invoice and Reversal Details | No Authorization | No Authorization |
| A/R Correction Invoice and Reversal Heade | No Authorization | No Authorization |
| A/R Credit Memo Details | No Authorization | No Authorization |
| A/R Credit Memo Header | No Authorization | No Authorization |
| A/R Invoice Details | No Authorization | No Authorization |
| A/R Invoice Header | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---------------------------------------|----------------------|--------------------------------|
| A/R Reserve Invoice Details | No Authorization | No Authorization |
| A/R Reserve Invoice Header | No Authorization | No Authorization |
| Delivery Details | No Authorization | No Authorization |
| Delivery Header | No Authorization | No Authorization |
| Return Details | No Authorization | No Authorization |
| Return Header | No Authorization | No Authorization |
| Sales Order Details | No Authorization | No Authorization |
| Sales Order Header | No Authorization | No Authorization |
| Sales Quotation Details | No Authorization | No Authorization |
| Sales Quotation Header | No Authorization | No Authorization |
| Customer Receivables - Aging | No Authorization | No Authorization |
| Sales Analysis by Document | No Authorization | No Authorization |
| Profitability Analysis | No Authorization | No Authorization |
| Customer Relationship Management | No Authorization | No Authorization |
| Opportunities | No Authorization | No Authorization |
| Opportunity Win Rate Analysis | No Authorization | No Authorization |
| Financials | No Authorization | No Authorization |
| Budget and Cost Accounting | No Authorization | No Authorization |
| Budget Analysis Query | No Authorization | No Authorization |
| Cost Center Budget VS Actual Query | No Authorization | No Authorization |
| Financial Accounting | No Authorization | No Authorization |
| Balance Sheet Comparison Query | No Authorization | No Authorization |
| Balance Sheet Query | No Authorization | No Authorization |
| Cash Flow Statement Query | No Authorization | No Authorization |
| Profit And Loss Comparison Query | No Authorization | No Authorization |
| Profit And Loss Query | No Authorization | No Authorization |
| Management Accounting | No Authorization | No Authorization |
| Aging Query | No Authorization | No Authorization |
| G/L Account Period Amount Query | No Authorization | No Authorization |
| G/L Account Period Balance Query | No Authorization | No Authorization |
| General Ledger Account Query | No Authorization | No Authorization |
| General Ledger Business Partner Query | No Authorization | No Authorization |
| Sub Ledger Query | No Authorization | No Authorization |
| Tax Report Query | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Transactional Journal Query | No Authorization | No Authorization |
| VAT Report Query | No Authorization | No Authorization |
| KPI Balance Sheet Query | No Authorization | No Authorization |
| KPI Cash Flow Statement Query | No Authorization | No Authorization |
| KPI Profit And Loss Query | No Authorization | No Authorization |
| Budget Analysis | No Authorization | No Authorization |
| Cost Center Analysis | No Authorization | No Authorization |
| Cost Accounting Versus Financial Accounting | No Authorization | No Authorization |
| Financial Analysis | No Authorization | No Authorization |
| Inventory | No Authorization | No Authorization |
| Inventory Status | No Authorization | No Authorization |
| Inventory Transaction Documents | No Authorization | No Authorization |
| Pervasive Analytics Designer | No Authorization | No Authorization |
| Content | Various Authorizations | Various Authorizations |
| KPI | Various Authorizations | Various Authorizations |
| Total Assets | No Authorization | No Authorization |
| Total Liabilities | No Authorization | No Authorization |
| Total Equity | No Authorization | No Authorization |
| Net Sales Revenue | Full Authorization | Full Authorization |
| Net Cash Flow (Operating) | No Authorization | No Authorization |
| Net Cash Flow (Investment) | No Authorization | No Authorization |
| Net Cash Flow (Financial) | No Authorization | No Authorization |
| Cash | No Authorization | No Authorization |
| Accounts Receivable | Full Authorization | Full Authorization |
| Inventory | No Authorization | No Authorization |
| Accounts Payable | No Authorization | No Authorization |
| COGS | No Authorization | No Authorization |
| Total Current Assets | No Authorization | No Authorization |
| Total Current Liabilities | No Authorization | No Authorization |
| Working Capital | No Authorization | No Authorization |
| DSO | Full Authorization | Full Authorization |
| DPO | No Authorization | No Authorization |
| DIO | No Authorization | No Authorization |
| CCC | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|----------------------|--------------------------------|
| OC | No Authorization | No Authorization |
| Asset Turnover | No Authorization | No Authorization |
| Inventory Turnover | No Authorization | No Authorization |
| Gearing Ratio | No Authorization | No Authorization |
| Current Ratio | No Authorization | No Authorization |
| Quick Ratio | No Authorization | No Authorization |
| Debt Ratio | No Authorization | No Authorization |
| Cash Ratio (By Revenue) | No Authorization | No Authorization |
| Gross Profit | Full Authorization | Full Authorization |
| Gross Profit Margin | Full Authorization | Full Authorization |
| Operating Cost | No Authorization | No Authorization |
| Expense 1 | No Authorization | No Authorization |
| Expense 2 | No Authorization | No Authorization |
| Operating Income | No Authorization | No Authorization |
| Net Profit | No Authorization | No Authorization |
| Net Profit Margin | No Authorization | No Authorization |
| Operating Margin | No Authorization | No Authorization |
| Cash Ratio (By Profit) | No Authorization | No Authorization |
| ROE | No Authorization | No Authorization |
| Net Cash Flow | No Authorization | No Authorization |
| Receivables Overdue | No Authorization | No Authorization |
| Payables Overdue | No Authorization | No Authorization |
| Total Sales Amount | Full Authorization | Full Authorization |
| Sales Return Amount | Full Authorization | Full Authorization |
| Total Receivable Amount | Full Authorization | Full Authorization |
| Total Purchase Amount | No Authorization | No Authorization |
| Goods Return Amount | No Authorization | No Authorization |
| Total Payable Amount | No Authorization | No Authorization |
| GRPO Not Invoiced | No Authorization | No Authorization |
| Inventory Value | No Authorization | No Authorization |
| Inbound Inventory Value | No Authorization | No Authorization |
| Outbound Inventory Value | No Authorization | No Authorization |
| Inventory Turnover (Year) | No Authorization | No Authorization |
| Weighted Amount of All Open Opportunities (LC) | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|--------------------------------|
| Average Fulfillment Days for a Sales Order | No Authorization | No Authorization |
| Average Delivery Variance Days | No Authorization | No Authorization |
| Average Fulfillment Days for a Purchase Order | No Authorization | No Authorization |
| Average Receipt Variance Days | No Authorization | No Authorization |
| Open Amount of Deliveries for Customer | No Authorization | No Authorization |
| Customer Receivables | No Authorization | No Authorization |
| Potential Amount of My Open Opportunities | No Authorization | No Authorization |
| My Sales Amount (with Tax) for Current Month | No Authorization | No Authorization |
| Total Sales Amount (LTD) | No Authorization | No Authorization |
| Gross Profit (LTD) | No Authorization | No Authorization |
| Total Sales Amount (YTD) | No Authorization | No Authorization |
| Gross Profit (YTD) | No Authorization | No Authorization |
| Gross Profit Margin (YTD) | No Authorization | No Authorization |
| Number of Open Sales Quotations | No Authorization | No Authorization |
| Number of Open Sales Orders | No Authorization | No Authorization |
| On-Time Delivery Rate | No Authorization | No Authorization |
| Number of Open Deliveries | No Authorization | No Authorization |
| Open Amount of Deliveries | No Authorization | No Authorization |
| Sales Return Amount for This Year | No Authorization | No Authorization |
| Number of Open Service Calls | No Authorization | No Authorization |
| Credit Limit Deviation | No Authorization | No Authorization |
| Total Receivable Amount (LTD) | No Authorization | No Authorization |
| Potential Amt of Open Opportunities | No Authorization | No Authorization |
| Opportunity Win Rate (LTD) | No Authorization | No Authorization |
| Churn Probability | Full Authorization | Full Authorization |
| Monthly Closed Tickets | No Authorization | No Authorization |
| Yearly In-Service Rate | No Authorization | No Authorization |
| Dashboard | Various Authorizations | Various Authorizations |
| Aging of Receivables Overdue (10-Day Interval) | No Authorization | No Authorization |
| Aging of Payables Overdue (10-Day Interval) | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|--|----------------------|--------------------------------|
| Top 5 Customers by Receivables Overdue | No Authorization | No Authorization |
| Top 5 Vendors by Payables Overdue | No Authorization | No Authorization |
| Top 5 Best Selling Items by Sales Amount | Full Authorization | Full Authorization |
| Top 5 Customers by Sales Amount | Full Authorization | Full Authorization |
| Revenue Versus Gross Profit for Last 6 Months | No Authorization | No Authorization |
| Top 5 Purchased Items by Purchase Amount | No Authorization | No Authorization |
| Top 5 Vendors by Purchase Amount | No Authorization | No Authorization |
| Total Purchase Versus Goods Return for Last Six Months | No Authorization | No Authorization |
| Top 5 Item Groups by Inventory Value | No Authorization | No Authorization |
| Inv. Turnover of Last 12 Months (6-Month Comp.) | No Authorization | No Authorization |
| Inventory Turnover (By Item Group) | No Authorization | No Authorization |
| Inventory Turnover (By Warehouse) | No Authorization | No Authorization |
| Top 5 Sales Employees by Sales Amount | No Authorization | No Authorization |
| Sales Order Amount by Months (LC) | No Authorization | No Authorization |
| Top 5 Best Selling Items by Sales Amount (Mobile) | No Authorization | No Authorization |
| Potential Amt of Open Oppty by Stages - Curr. User | No Authorization | No Authorization |
| Top 5 Customers by Sales Amount - Curr.User | No Authorization | No Authorization |
| Sales Order Amount by Mo./Qtr/Yr (LC) - Curr. User | No Authorization | No Authorization |
| Top 5 Best Selling Items by Sales Amt - Curr. User | No Authorization | No Authorization |
| Aging of Receivables Overdue (30-Day Interval) | No Authorization | No Authorization |
| On-Time Dely Rate by Number by Cust. (Last 6 Mo.) | No Authorization | No Authorization |
| Avg. Ord. Fulfillment Days by Cust. (Last 6 Mo.) | No Authorization | No Authorization |
| Revenue Versus Gross Profit for Last 6 Years | No Authorization | No Authorization |

| Subject | Authorization | Effective Authorization |
|---|------------------------|--------------------------------|
| Top 5 Best Selling Items by Sales Amt of This Year | No Authorization | No Authorization |
| Advanced Dashboard | Various Authorizations | Various Authorizations |
| Adv. Dashboard for SAP Business One Sales App - Curr. Sales EE (only available in the version for SAP HANA) | Full Authorization | Full Authorization |
| Adv. Dashboard for SAP Business One Sales App - Customer (only available in the version for SAP HANA) | Full Authorization | Full Authorization |
| Customer 360 | No Authorization | No Authorization |
| Adv. Dashboard for SAP Business One Service App (only available in the version for SAP HANA) | Full Authorization | Full Authorization |
| Fiori-Style Cockpit Management | No Authorization | No Authorization |
| Cockpit Management | No Authorization | No Authorization |
| Cockpit Designers | No Authorization | No Authorization |
| Count Widget Setup | No Authorization | No Authorization |
| Browser Widget Setup | No Authorization | No Authorization |
| Cockpit Content | No Authorization | No Authorization |
| Count Widgets | Various Authorizations | Various Authorizations |
| My Sales Orders Not Delivered | Full Authorization | Full Authorization |
| My Open A/R Invoices | Full Authorization | Full Authorization |
| My Purchase Orders Not Received | No Authorization | No Authorization |
| My Open A/P Invoices | No Authorization | No Authorization |
| My Open Inv. Transfer Requests | No Authorization | No Authorization |
| Browser Widgets | Full Authorization | Full Authorization |
| Default Homepage | Full Authorization | Full Authorization |
| My Workbench | Various Authorizations | Various Authorizations |
| Sales Process | Full Authorization | Full Authorization |
| Purchasing Process | No Authorization | No Authorization |
| Inventory Management Process | No Authorization | No Authorization |
| Financial Process | No Authorization | No Authorization |
| Others | Full Authorization | Full Authorization |
| My Recent Updates | Full Authorization | Full Authorization |
| My Recent Updates | Full Authorization | Full Authorization |
| My Recent Updates | Full Authorization | Full Authorization |

| Subject | Authorization | Effective Authorization |
|--|------------------------|-------------------------|
| My Recent Updates | Full Authorization | Full Authorization |
| My Recent Updates | Full Authorization | Full Authorization |
| Common Functions | Full Authorization | Full Authorization |
| Messages and Alerts | Full Authorization | Full Authorization |
| Crystal Dashboard | Various Authorizations | Various Authorizations |
| Service Call - SAP HANA | Full Authorization | Full Authorization |
| Sales Analysis - SAP HANA | Full Authorization | Full Authorization |
| Purchase Quotations - SAP HANA | No Authorization | No Authorization |
| Inventory Status - SAP HANA | No Authorization | No Authorization |
| Delivery Analysis - SAP HANA | No Authorization | No Authorization |
| Sales Employee Performance Target - SAP HANA | No Authorization | No Authorization |
| Payment Collection Analysis - SAP HANA | No Authorization | No Authorization |
| Cash Flow Forecast - SAP HANA | No Authorization | No Authorization |
| Inventory Counting Recommendation - SAP HANA | No Authorization | No Authorization |
| User Authorization | No Authorization | No Authorization |

4. Create a new employee with the *Role* of *Technician*, and link the employee to the new user.
5. Go to **Document Settings > General** and select *Enable Multiple Scheduling for Service Calls*.

We recommend that you change the initial password for the mobile app user before the user uses SAP Business One Service. To change the password, from the SAP Business One client, choose **Administration > Setup > General > Security > Change Password**.

If you use the mobile app only, without the SAP Business One client (for example, you have a mobile sales license), you will not be able to change your password from the mobile app.

For information about how to perform the above steps, see the [online help](#) for SAP Business One, version for SAP HANA.

Results

A mobile user account is created. You need to provide the mobile app user with the user code and password.

6.4 Deploying Certificates

This topic describes how to deploy a certificate to your mobile device.

To ensure the highest security standard for your company and your business data, SAP introduced the exclusive use of valid SSL certificates. In SAP Business One, the System Landscape Directory and the Service Layer components enforce secure connection through HTTPS encryption. You need to ensure that your mobile device is also secured by the certificates.

- **Purchased certificate (Recommend):**
We recommend that you use a purchased certificate (for example, PKCS12 certificate).
To import certificate to SAP Business One, version for SAP HANA, follow instructions on the *Certificate* part of chapter *SAP Business One, version for SAP HANA* in SAP Note [2046101](#).
If you use a purchased certificate, you normally don't need to deploy the certificate to your mobile device. If you are asked to do so, please contact your certificate vendor.
- **Self-signed certificate (SAP Business One default certificate):**
If you use a self-signed certificate, you must first export the certificates that you used for System Landscape Directory, Mobile Service, and Analytics Platform, and then import them to your mobile device.
- **Self-signed certificate (Self-generated certificate):**
If you want to re-generate self-signed certificate for your server, refer to SAP Note [2298985](#).
If you are using external address mapping for mobile service, refer to *Prepare Certificate and Configure Nginx Reverse Proxy* sections in the guide *How to Deploy SAP Business One (Cloud) with Browser Access*.

Note

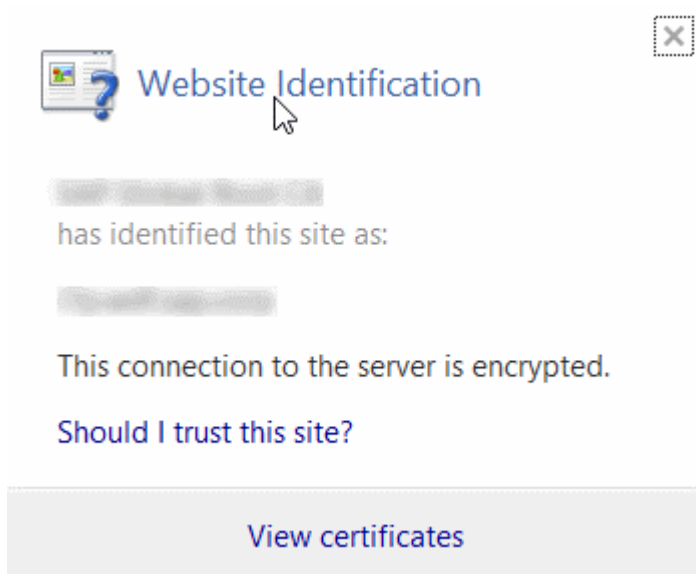
If you have used different certificates for these services, you must repeat the export and import procedures for each certificate.

To **export a certificate**, perform the following steps:

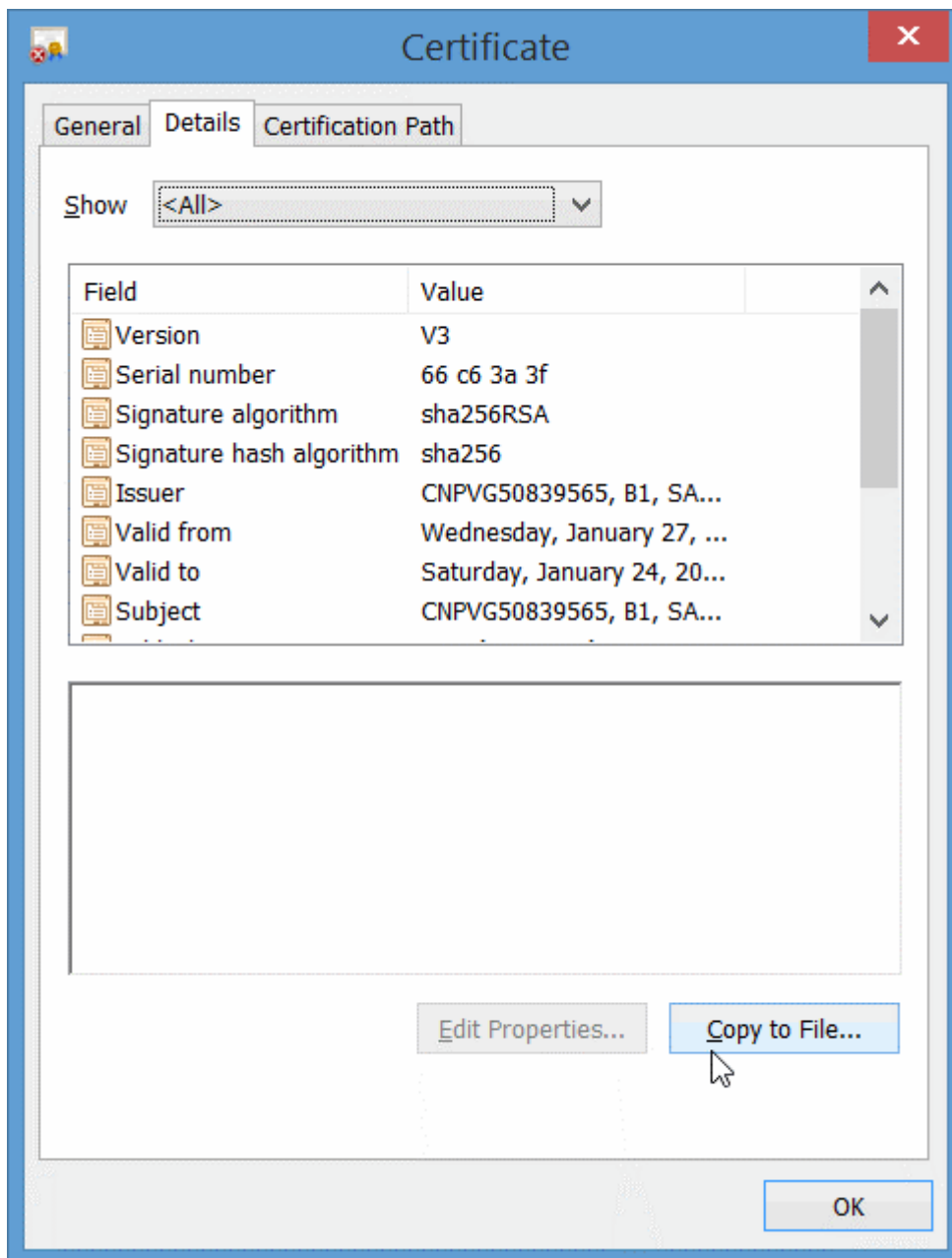
1. In a Web browser, enter the URL for the System Landscape Directory, Mobile Service or Analytics Platform and press .
2. In the Web address bar, click the security report icon.



3. Click *View certificates*.



4. In the *Certificate* window, on the *Details* tab, choose *Copy to File*.



5. In the *Certificate Export Wizard* window, choose *Next*.
6. Select the *DER encoded binary X.509 (.CER)* format, and choose *Next*.
7. Enter a name for the file and the location (including the entire path), or click *Browse*, navigate to the location, and then enter the file name.
8. Click *Finish*.

To **import a certificate** to your mobile device, perform the following steps:

1. Send the certificate file to your iPhone by e-mail.
2. Click the e-mail attachment to install the certificate.

6.5 Configuring User Authentication

This topic shows you how to configure a type of authentication as a login method for the SAP Business One Service mobile app users.

Context

In an on-premise environment, you have the following authentication options:

- Single Sign On (Logging in with Windows domain user accounts).
- Logging in with SAP Business One user accounts.

In an on-demand environment, only Single Sign On is supported.

Procedure

To configure a type of user authentication for SAP Business One Service, proceed as follows:

1. Log in to the System Landscape Directory.
2. Go to *Security & Logging*.
 - If you want the mobile app users to log in to SAP Business One Service with Windows domain user accounts, select both *Enable Single Sign On (Log In Using Windows Domain Account)* and *Disable Logins with SAP Business One User Accounts*.
 - If you want the mobile app users to log in to SAP Business One Service with SAP Business One user accounts, deselect both *Enable Single Sign On (Log in Using Windows Domain Account)* and *Disable Logins with SAP Business One User Accounts*.

i Note

In the on-premise environment, you can't enable both of the authentication options. Even if you select *Enable Single Sign On (Log In Using Windows Domain Account)* and deselect *Disable Logins with SAP Business One User Accounts*, only Single Sign On will take effect.

6.6 Setting Up Attachment Folder

In the On-Premise Environment

You can set up a shared folder for attachments in either one of the following ways:

Method 1

1. From the Windows server:
 1. Create a shared folder with read and write permission.
 2. In the SAP Business One client, choose **Administration** > **System Initialization** > **General Settings** > **Path**. In the **Attachments Folder** field, enter the shared folder. Make sure that the folder path is a network path rather than a local path. For example, \\10.59.38.19\Attachments.
2. From the Linux server where the Mobile Service is installed:
 1. Create a folder (for example, /mnt/Attachments).
 2. Mount the Linux folder to the Windows folder by running the following command:

```
mount -t cifs -o domain=xxxxxx,username=xxxxxx,password=xxxxxx,file_mode=0777,dir_mode=0777 "//10.59.38.19/Attachments/" /mnt/Attachments
```

i Note

Please be noted that the path is case-sensitive.

3. Replace `username` and `password` with the username and password of the Windows server.

Method 2

Alternatively, you can use the system configuration file `/etc/fstab` to automatically mount the Linux folder to the Windows shared folder once the Linux server reboots. To do this, perform the following steps:

1. Log in as a root user to the Linux server where you install the Mobile Service, and create a credential file (for example, `/etc/mycifspass`) with the following content:

```
domainname=xxxxxx
username=xxxxxx
password=xxxxxx
file_mode=0777
dir_mode=0777
```
2. Open the system configuration file `/etc/fstab` and append one line as below:

```
//10.59.38.19/Attachments/ /mnt/Attachments cifs credentials=/etc/mycifspass 0 0
```

i Note

Please be noted that the path is case-sensitive.

3. Reboot the Linux server and you will find the Windows shared folder automatically mounted.

In the On-Demand Environment

1. In the Cloud Control Center for SAP Business One, choose ► [Landscape Management](#) ► [Service Units](#) ►.
2. Choose the appropriate service unit, and on the [Storage](#) tab, copy the path defined as a shared folder for the corresponding service unit (for example: \\server_hostname\SharedFolder\SU-XYZ).
3. Paste the path to a text editor and replace the backslash (\) with a forward slash (/). The folder path is then as follows: //server_hostname/SharedFolder/SU-XYZ.

i Note

As the application is case-sensitive, we recommend that you copy and paste the path rather than type it manually.

4. Create an empty folder on the Linux server on which the Job Service is installed, for example: /mnt/attachment.
Give permission to this folder with the command: `chmod 777 -R /mnt/attachment`.
5. Mount the folder path from Step 3 to the empty folder created in Step 4 (please copy the path) with the following command:

```
mount -t cifs -o domain=<domain name>,username=saperviceblc,pass=**password**,sec=<security mode>,uid=<sid>adm,forceuid '//server_hostname/SharedFolder/SU-XYZ' /mnt/attachment
```

Alternatively, open the `/etc/fstab` file and add the following text to automate the process of mounting partitions:

```
//server_hostname/SharedFolder/SU-XYZ /mnt/attachment cifs credentials=/root/.cifs,domain=<domain name>,uid=<sid>adm,forceuid,sec=<security mode> 0 0 /root/.cifs:username=saperviceblcpassword=**password**
```

The default security mode in mainline kernel versions prior to v3.8 is `sec=ntlm`. In v3.8, the default security mode is changed to `sec=ntlmssp`.

To view a complete list of all parameters, please refer to the `mount.cifs(8)` manual page (for example, `man mount.cifs`).

6. After mounting the folder, use the `cp` command to test if the files in the folder are readable.

6.7 Setting Up Approval Procedure for Sales Orders

This topic details the steps for setting up an approval procedure for sales orders.

Context

To activate the approval procedure, from the SAP Business One client, choose [Main Menu](#) [Administration](#) [System Initialization](#) [General Settings](#) [BP](#) tab and then select the checkboxes [Activate Approval Procedures](#), and [Activate Approval Procedures in DI](#).

For more information about the setup, see the section [Approval Process](#) in the online help for SAP Business One.

6.8 Setting Up Add-Ons to Run Within SAP Business One Service Mobile App

Context

As of SAP Business One 9.2 PL08, version for SAP HANA, you can set up your own Web applications within the SAP Business One Service mobile app.

For SAP Business One add-ons that run on mobile devices and are delivered by partners, make the settings described below.

i Note

Setting up add-ons for SAP Business One Service is supported in the **on-premise** environment only.

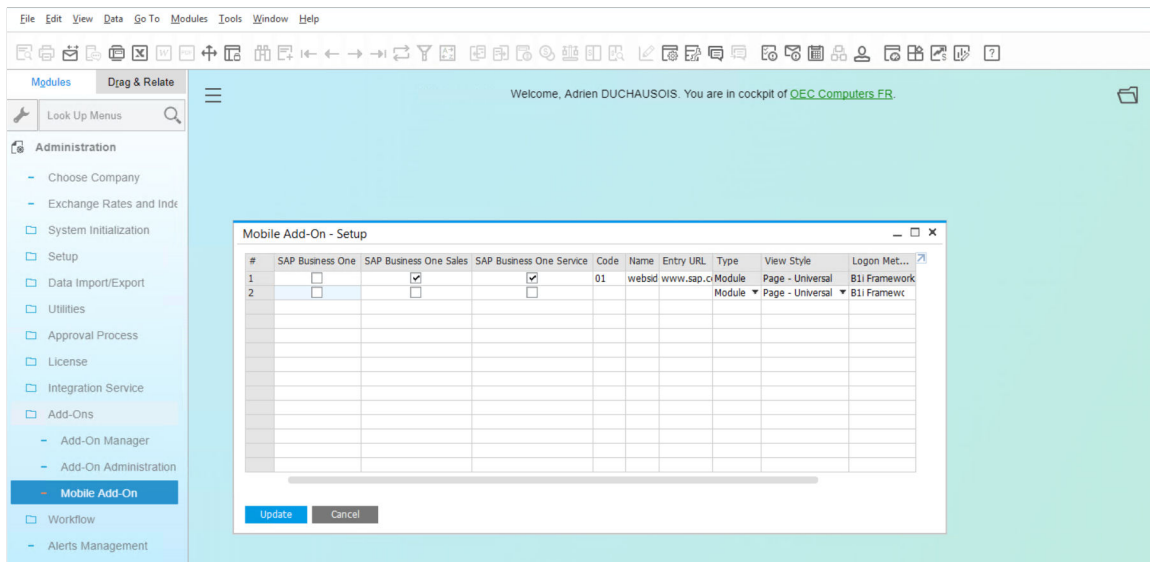
Procedure

1. From the SAP Business One [Main Menu](#), choose [Administration](#) [Add-Ons](#) [Mobile Add-On](#).
2. In the [Mobile Add-On - Setup](#) window, select whether the add-on is for the SAP Business One Service mobile app, or the SAP Business One mobile app, or both.
3. For the SAP Business One Service mobile app, enter the relevant data for the add-on in the [Code](#), [Name](#), [Entry URL](#), and [Provider](#) fields.

i Note


The *Type*, *View Style*, and *Logon Method* fields are for the SAP Business One mobile app only. They are not relevant for the SAP Business One Service mobile app.

4. Select the *Enable* checkbox.
5. To save your settings, choose *Update*.



Next Steps

After you set up an add-on from SAP Business One, the add-on can be accessed from the SAP Business One Service mobile app main menu.

Tap the  icon in the top left hand corner of the home page; you can see the add-on appears at the bottom of the functions list.

i Note

Single sign on (SSO) is supported. If you have registered this add-on to the System Landscape Directory (SLD) of SAP Business One, you can open the add-on directly without entering credentials.



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Settings

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A123001



Add-On

Offline Settings



UDF Configuration



Touch ID



Online Help



Log Out

Version: 1.1034

7 Document History

This section provides details about the changes made in each version of this document.



| Version | Date | Description |
|----------------|--------------------|--|
| 1.0 | April 27, 2018 | First version |
| 1.1 | September 28, 2018 | Supports approval procedure |
| 1.2 | May 23, 2019 | Supports viewing common solutions, information of related tickets and customer information, and creating follow-up tickets |
| 1.3 | September 09, 2019 | KPI dashboard configuration settings are updated. Report template configuration settings are updated. |

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